# Highfield Level 4 End-Point Assessment for ST0229 Hospitality Manager

## End-Point Assessment Kit


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**Pathway:**

**Conference and Events Management**

# Highfield Level 4 End-Point Assessment for ST0229 Hospitality Manager - Conference and Events Management

EPA Kit

## Contents

Please click on the headings below to navigate to the associated section of the EPA Kit.



**Versions:**

ST0229 / v1.0

HMCE v2.1

# How to use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Hospitality Manager - Conference and Events Management apprenticeship standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 4 Hospitality Manager - Conference and Events Management apprenticeship standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process, and additionally all end-point assessments are externally quality assured by the relevant EQA organisation.

The EPA Kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful as a starting point.

**In this kit, you will find:**

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

# Introduction

## Standard overview

Hospitality managers work across a huge variety of organisations including bars, restaurants, cafes, conference centres, banqueting venues, hotels and contract caterers. These managers generally specialise in a particular area, however their core knowledge, skills and behaviours are aligned. Common to all managers in this role is their passion for exceeding customers' expectations. Hospitality managers have a high level of responsibility and are accountable for fulfilling the business vision and objectives which requires excellent business, people and customer relation skills. Individuals in this role are highly motivated team leaders that combine a talent for management and specific industry skills and thrive on the customer facing nature of the role.

## Specialist function overview

Conference and events managers manage the delivery of functions often simultaneously such as business conferences, conventions, banquets or weddings. The role requires managing meticulous co-ordination liaising with multiple departments across the business to meet a variety of different customer needs and expectations.

## On-programme requirements

Although learning, development and on-programme assessment is flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Hospitality Manager - Conference and Event Management apprenticeship standard.

The on-programme assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of an apprentice's performance against the final outcomes defined in the standard. The training provider will need to prepare the apprentice for the end-point assessment, including preparation for the professional discussion and business project.

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and which ensure that the apprentice is sufficiently prepared to undertake the end-point assessment. Training, development and ongoing review activities should include:

- achievement of level 2 English and maths. If the apprentice began their apprenticeship training before their 19th birthday, they will still be subject to the mandatory requirement to study towards and achieve English and maths. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.

**Business project proposal**

It is recommended that the business project proposal is completed on the business project proposal form provided at gateway, however alternative forms developed by training providers are permissible. This should take the form of a 2-page synopsis. Highfield will sign off the proposal at gateway to ensure the proposed project has the potential to meet the business project criteria. This will be done within 7 days of agreeing the EPA schedule. If, for any reason, the proposal is not approved at this stage, a revised proposal should be sent to the employer and Highfield within 7 days. The Business Project Proposal form can also be found on the Highfield website.

The proposal should include identification of the problem (or issue/opportunity/ challenge) that is to be explored in their project and the intended approach to research and making recommendations.

## Use of artificial intelligence (AI) in the EPA

Where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio.

Where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio.

## Readiness for end-point assessment

For an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved Level 2 English and maths. The requirements for English and maths are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- the apprentice must submit a business project proposal for the business project within 14 days of the EPA being arranged. This must be approved by the end-point assessor

- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the Gateway Readiness Report.
- the apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within a 2-month end-assessment window. Further information about the gateway process is covered later in this kit.

If you have any queries regarding the gateway requirements, please contact your EPA customer engagement manager at Highfield Assessment.

## Order of end-point assessments

There are 3 assessment components for the Hospitality Manager - Conference and Events end-point assessment. The on-demand test can be taken at any time prior to the professional discussion. The business project must be submitted to Highfield a minimum of 7 days prior to the professional discussion being undertaken. The professional discussion must be the last activity completed. All assessment activities must be completed within 2 months.

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# The Highfield approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

**Documents used in developing this end-point assessment**

Standard (2018)

[Hospitality Manager / Skills England](https://skillsengland.education.gov.uk)

End-point assessment plan (ST0229/v1.0)

https://skillsengland.education.gov.uk/media/6888/st0229_hospitality_manager_l4_ap-for-publication-23012023-1.pdf

**Specific considerations**

All the evidence criteria used within the end-point assessment have been written by Highfield and are based on the Hospitality Manager apprenticeship standard and assessment plan. There is carry over criteria between the business project and professional discussion. Criteria relating to the professional discussion may also be included in the business project. In this instance, this criterion will not be reassessed during the professional discussion. Therefore, any pass or distinction criteria not awarded in the business project can be attempted in the professional discussion.

The on-demand test has been split into two separate exams, with 1 covering the core hospitality management functions and the other covering the specialist pathway questions. As a result, apprentices will sit 2 exams. In the event of a resit or retake, apprentices will only be required to retake the component in which they did not achieve a pass.

The assessment plan does not specify the number of marks specifically needed to pass the on-demand test, only that 70% must be achieved for a pass and 85% for distinction. When transferring this to the marks required, Highfield found that this did not yield a whole number. Highfield has therefore rounded up the calculated mark to the next whole number and designated the following marks. This is to ensure apprentices will meet the percentage required for each grade.

- To pass the core on-demand test apprentices must achieve 18 of the 25 marks
- To pass the pathway on-demand test apprentices must achieve 7 of the 10 marks

The assessment plan states that the professional discussion feedback templates will be sent to the apprentice either electronically or via first-class post. Highfield's approach is that this feedback template will be accessed through the Highfield website.

Due to the publication of the Flexibility Framework document, the stipulated order of assessment methods has been removed in order to allow for increased flexibility in delivering end-point assessments. Therefore, there is now no longer a requirement to pass any element of the assessment before moving to the next assessment method.

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# Gateway

## How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have completed the following. The requirements for English and maths listed below are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths listed below are optional for apprentices aged 19+ at the start of their apprenticeship training.

- Achieved Level 2 English
- Achieved Level 2 maths
- Produced the business project proposal

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training if they have not previously been achieved. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

## The gateway meeting

The gateway meeting should last around an hour and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your EPA customer engagement manager at Highfield Assessment.

**Please note:** a copy of the standard should be available to all attendees during the gateway meeting.

**Reasonable adjustments and special considerations**

Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments policy for further information/guidance.

**ID requirements**

Highfield Assessment will need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are, therefore, required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, such as an employee ID card or travel card

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# The Hospitality Manager - Conference and Events apprenticeship standard

Below are the knowledge, skills and behaviours (KSBs) from the standard and related assessment criteria from the assessment plan. On-programme learning will be based upon the KSBs and the associated assessment criteria are used to assess and grade the apprentice within each assessment method.

<table>
<tr><th colspan="2">Business</th></tr>
<tr><th>Knowledge</th><th>Skills</th></tr>
<tr><td>K1 Understand how to use relevant operating models to help achieve the business vision and objectives of hospitality businesses and how these are used in own area of business<br><br>K2 Understand how to manage finance and minimise costs within hospitality businesses; identify the income streams and cost centres and areas for potential waste or loss within own area of business<br><br>K6 Identify peaks and troughs in business levels and understand the factors which influence them e.g. season, weather, cultural and special occasions such as Valentine’s Day, New Years<br><br>K7 Determine how to develop contingency plans which allow consistent levels of service in line with business standards and requirements<br><br>K9 Understand environmental, legislative and social responsibilities and their impact within hospitality businesses</td><td>S2 Monitor and manage income and costs, use forecasting to set realistic targets, evaluate the control of resource allocation, and prepare financial cases for improvement projects<br><br>S7 Develop and implement contingency plans to ensure resources are in place to provide consistent levels of service required by the business<br><br>S9 Manage and continuously review adherence to legislation</td></tr>
<tr><th colspan="2">On-demand test</th></tr>
<tr><td colspan="2">C1 The importance of business value and objectives (K1)<br><br>C2 The need for performance targets and how these are commonly developed (K1)<br><br>C3 How trends are incorporated into forecasting (K6)<br><br>C4 How a financial strategy is prepared, including the risks, constraints and implications for policies (K2, S2)</td></tr>
</table>

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| **C5** The **financial data** required to support decision making and **forecasting** in a hospitality business (K2, S2)<br>**C6** The concepts of **regularity** and **propriety**, and the need for **financial accountability** (K2, S2)<br>**C9** The importance of having **a clear strategy for the business** (K1)<br>**C10** The principles and purpose of **a contingency plan** (K7, S7)<br>**C19 Legal and regulatory framework** covering the hospitality industry (K9, S9)<br>**C20 Legal and ethical principles governing marketing in the sector** (K9, S9) |
| **Amplification and guidance** |

- **Forecasting** is the process of predicting future performance based on historical data, trends, and business insights. It helps hospitality managers prepare for expected levels of demand, revenue, costs and resource use.
  - Types of forecasting could include:
    - revenue forecasting - predicting income from rooms, events and food and beverages
    - labour forecasting - estimating staffing needs based on anticipated footfall or booking levels
    - stock forecasting - planning inventory needs for peak periods
  - How trends are incorporated into forecasting could include:
    - collecting data from systems, such as point-of-sale (POS), booking platforms or feedback forms
    - analysing patterns and identifying whether performance increases or decreases at certain times or in response to specific events
    - adjusting future plans depending on what the trend suggests, such as, adapting budgets, staffing, menus, marketing or purchasing decisions
    - monitoring outcomes by comparing forecasted performance with actual results and adjusting again as needed

- **Business values** are the core principles and ethical standards that guide the behaviours, culture and service standards of a hospitality organisation.
  - They represent what the business stands for. This could include:
    - customer focus - putting the guest at the centre of everything
    - sustainability - operating in an environmentally conscious way
    - teamwork - encouraging collaboration and mutual support
    - integrity - being honest, fair, and transparent in all dealings
    - excellence - striving for the highest standards in service

- Understanding the importance of value and objectives helps managers:
  - align team behaviours and decisions with what the business is trying to achieve
  - motivate teams by connecting daily tasks to a bigger purpose
  - prioritise activities and use resources effectively
  - maintain consistency across departments and locations
  - measure success and identify where change is needed

- **Performance targets** are specific, measurable goals that help a hospitality business track progress and ensure standards are being met. They are often aligned with key performance indicators (KPIs) and linked to business objectives such as improving profitability, efficiency or customer satisfaction. Targets apply across departments and support day-to-day operational management, strategic planning and staff performance monitoring.
  - Performance targets could include:
    - labour costs as a percentage of revenue
    - food and beverage costs
    - stock turnover or stockholding value
    - customer satisfaction scores, for example, post-stay surveys or online reviews
    - sales per head, for example, average spend per customer
    - take per staff hour (TPSH)
    - occupancy rates or room bookings
    - gross profit on sales
    - marketing and advertising return on investment (ROI)
    - repeat booking rate or guest loyalty metrics
  - Targets are typically developed through a combination of different methods. This could include:
    - reviewing historic data, which includes looking at past sales, customer feedback or cost patterns
    - analysing financial reports, including profit margins, the cost of goods sold or labour percentages
    - considering business forecasts and seasonal trends, such as peak periods, events and marketing plans
    - aligning with wider business objectives, such as growth, sustainability or service excellence
    - consulting with department managers or team leaders who may provide insight into realistic and achievable goals

- **Trends** are patterns or shifts in customer behaviour, market activity or internal performance that develop over time. Identifying and analysing trends allows hospitality managers to anticipate future demands, costs or resource needs. Types of trends could include:
  - customer trends - changes in guest preferences, booking behaviours or expectations, for example, a preference for online check-in or local produce
  - sales trends - seasonal peaks and troughs in occupancy or food and beverage sales
  - operational trends - patterns in staffing levels, maintenance needs, or supply chain issues
  - market trends - industry-wide changes, such as demand for sustainable options or digital ordering platforms
  - external trends - events, economic conditions, public holidays or weather forecasts that influence trade

- **Financial strategy** is a planned approach to managing a business's income, expenditure, and investment to achieve short- and long-term objectives. It helps ensure that the business remains profitable, sustainable and financially secure.
  - Elements of a financial strategy could include:
    - revenue targets
    - cost control measures
    - profitability forecasts
    - investment or growth plans
    - budget allocations across departments
  - Preparing a financial strategy could include:
    - reviewing historical data, for example, past revenue, labour costs or seasonal variations
    - forecasting future performance based on trends, events or market changes
    - setting financial targets aligned with business objectives
    - allocating budgets for departments
    - identifying potential risks and constraints that could affect financial plans
  - Financial strategies often lead to changes in policies/operational procedures to align with budget goals, manage risks or address constraints. This could include:
    - amending staff rota policies to control labour costs
    - introducing procurement policies to monitor stock spending
    - adjusting refund or discount policies to maintain revenue

        - reviewing training investment policies based on budget availability

- **Risks** are uncertainties or events that could negatively impact the financial strategy. These may be internal or external and must be considered when planning. Risks could include:
    - sudden drops in customer demand
    - increases in supplier prices
    - rising utility or wage costs
    - staff shortages leading to overtime costs
    - poor forecasting or over-reliance on high seasons

- **Constraints** are limitations or restrictions that may affect the ability to implement a financial strategy effectively. Types of constraints could include:
    - fixed budgets
    - limited staffing or training capacity
    - outdated systems or equipment
    - supplier availability or delivery times
    - regulatory requirements, for example, wage legislation or health and safety

- **Financial data** refers to numerical information related to the income, expenses and profitability of a hospitality business. This data is essential for tracking performance, planning ahead and making operational or strategic decisions. Types of financial data used could include:
    - revenue and sales reports
    - labour costs
    - food and beverage costs
    - stock levels and values
    - profit and loss statements
    - gross and net profit margins
    - budget versus actual reports

- **Regularity** refers to ensuring that financial activity follows the correct processes and is authorised, legal and in line with internal policies or procedures. Reasons this is important could include:
    - preventing the misuse or misdirection of funds
    - ensuring spending complies with budgets, contracts or procurement guidelines
    - demonstrating integrity and professional standards

- **Propriety** relates to the ethical and moral standards that underpin financial conduct. It means behaving honestly, fairly and responsibly with financial matters, even when the rules allow flexibility. Reasons this is important could include:
    - preventing conflicts of interest, fraud or the unethical use of resources
    - building trust and credibility with staff, customers and stakeholders
    - encouraging the responsible use of public or private business funds

- **Financial accountability** means being answerable for financial decisions, actions and outcomes. It involves recording, reporting and justifying how money is used or allocated. Reasons this is important could include:
    - ensuring transparency in how budgets are managed
    - allowing for correct auditing and financial reporting
    - helping to control costs and track business performance
    - supporting compliance with laws, policies and regulations

- **A clear strategy for the business** is a planned, long-term approach to achieving the goals of the business. It provides a clear direction for all departments and helps to align actions with the organisation's vision and values.
    - Features of a business strategy could include:
        - defined objectives, for example, growth, profitability or guest satisfaction
        - timelines and measurable targets
        - resource planning, for example staffing, budgets or marketing
        - alignment with customer needs and market conditions
    - Reasons why having a clear strategy for the business is important could include how it:
        - provides direction and consistency - all departments understand the priorities and work towards common goals

        - improves resource allocation - time, staffing and budget decisions are guided by strategic priorities
        - supports performance management - targets can be tracked and reviewed
        - helps anticipate and respond to change - a strategy enables more effective decision-making in response to trends or challenges
        - drives customer satisfaction and profitability - clear goals lead to consistent and focused service delivery

- **A contingency plan** is a prepared strategy or set of actions designed to respond to unexpected situations or disruptions so that normal business operations can continue or recover quickly.
    - The purposes of a contingency plan could include:
        - minimising the disruption to services
        - protecting customer safety and satisfaction
        - safeguarding revenue and reputation
        - supporting effective communication during emergencies
        - maintaining staff confidence and coordination
    - The principles of a contingency plan could include:
        - preparedness - anticipating risks before they happen
        - clarity - defining clear roles, responsibilities and steps to follow
        - communication - ensuring staff understand the plan and how to respond
        - flexibility - adapting the response depending on the nature and scale of the issue
        - testing and reviewing - regularly updating the plan based on practice drills or past experiences

- **Legal and regulatory framework** refers to the laws, standards and official guidelines that businesses in the hospitality industry must follow. These cover a range of areas such as health and safety, food safety, employment, licensing, consumer protection and data protection. This could include:
    - Consumer Rights Act
    - Trade Descriptions Act
    - Food Safety Act
    - Food Hygiene Regulation
    - Licensing Act
    - Weights and Measures Act

- Data Protection Act / General Data Protection Regulation
- Employment Right Act
- Equality legislation
- Working Time Regulation
- Health and Safety at Work etc. Act

- **Legal and ethical principles governing marketing in the sector**
  - Legal principles refer to the laws that govern how businesses promote products and services, protect consumers, and ensure truthful and fair advertising. This could include:
    - Consumer Protection from Unfair Trading Regulations - prevents misleading or aggressive marketing practices
    - Advertising Standards Authority (ASA) guidelines - regulates advertising across media to ensure it is legal, decent, honest and truthful
    - Data Protection Act/General Data Protection Regulation - controls how personal data is collected, stored and used in marketing
    - Licensing and age-restricted promotions - prevents marketing to underage individuals, especially for alcohol, gambling and age-restricted entertainment
  - Ethical principles refer to doing what is morally right, even if not legally required. This includes honesty, fairness, inclusion, social responsibility and respecting customer trust. This could include:
    - avoiding exploiting vulnerable groups, for example, using guilt or fear in marketing
    - ensuring all marketing is respectful and culturally appropriate
    - avoiding greenwashing (misleading sustainability claims)

| People |
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| **Knowledge** |
| **K10** Know how to identify potential risks to people and the business and how to plan for and minimise the impact<br><br>**K11** Understand how to create a **people strategy** and how to effectively manage recruitment, induction, team development and succession planning in a hospitality business to deliver it<br><br>**K12** Know and understand how to consistently communicate and engage with people and teams |
| **On-demand test** |
| **C11** The content and importance of a **risk management** policy (K10)<br><br>**C12** The principles of effective **risk management** (K10)<br><br>**C13** The content and importance of a **people strategy** (K11)<br><br>**C14** The **principles of recruitment, induction and performance management**, including supporting documentation and procedures, such as job and person specifications (K11)<br><br>**C15** The principles of **effective listening**, **feedback** and evaluation of team performance (K12)<br><br>**C16** Principles of **effective communication** (K12) |
| **Amplification and guidance** |
| • **People strategy** is a planned approach to managing the workforce that aligns with the organisation's business goals. It covers how the business recruits, trains, develops, engages and retains its staff.<br>  ○ The contents of a people strategy could include:<br>    ▪ workforce planning - ensuring the right number of staff with the right skills are in place when needed<br>    ▪ recruitment and onboarding - attracting suitable candidates and giving them the tools to succeed from the first day<br>    ▪ training and development - providing ongoing learning opportunities to build staff skills and support career progression<br>    ▪ performance management - setting expectations, monitoring progress and giving feedback to help staff grow<br>    ▪ employee engagement and retention - keeping staff motivated and committed through good communication, recognition and workplace culture<br>    ▪ diversity, inclusion and wellbeing - creating a fair, respectful workplace that supports employee wellbeing and values differences<br>  ○ A clear people strategy helps a business to: |

        - attract and keep talented employees
        - deliver consistent service and customer satisfaction
        - reduce recruitment and training costs through improved retention
        - improve team morale, productivity and accountability
        - adapt to business needs by developing internal talent

- **Risk management** is the process of identifying potential threats to the business and taking steps to reduce or eliminate their impact.
    - A risk management policy is a formal document that outlines how a business identifies, assesses, controls and monitors risks that could negatively affect its operations, people, assets or reputation. The content of a risk management policy could include:
        - identification of risks
        - risk assessment procedures
        - prevention and control measures
        - roles and responsibilities
        - monitoring and reviewing
    - The importance of a risk management policy could include:
        - protecting staff, guests and business assets
        - reducing the likelihood of accidents, legal issues or service disruption
        - ensuring compliance with legal and regulatory obligations
        - building customer trust by showing commitment to safety and professionalism
        - supporting insurance compliance and claims processes
        - improving operational efficiency by anticipating and reducing issues

- **Principles of recruitment, induction and performance management**:
    - recruitment is the process of attracting, selecting and appointing candidates to fill job vacancies. It involves identifying staffing needs, advertising roles and using structured procedures to ensure that the best candidates are chosen. Supporting documentation and procedures could include:
        - job advertisements that are aligned with the job/person specification and legally compliant
        - application forms/CVs used to assess candidate suitability

    - shortlisting grids or scoring sheets to provide a consistent and fair way to compare applicants
    - interview questions and notes templates by having standardised questions help ensure fairness and focus on role-relevant competencies
    - offer letters and contracts of employment to confirm terms and ensure legal compliance
    - recruitment policy or process flowchart
    - equality, diversity and inclusion procedures
    - reference checking procedures
    - internal recruitment and promotion frameworks
  - induction is the process of integrating new employees into the organisation by familiarising them with company policies, procedures, culture and their specific job role. Supporting documentation and procedures could include:
    - an induction programme outline that lists sessions, topics and timelines
    - welcome packs that include the staff handbook, key contacts and uniform policies
    - induction checklists to track completed tasks
    - policy acknowledgement forms to confirm the employee has read key policies
    - training records or sign-off sheets to confirm when mandatory training has been completed
    - a new starter induction flow/process
    - a buddy or mentor assignment procedure
    - probation review timelines and templates
    - health and safety or food hygiene induction procedures
    - first week feedback forms to evaluate the induction experience
  - performance management is an ongoing process of setting objectives, monitoring progress, providing feedback and reviewing performance to support employee development and ensure alignment with business goals. Supporting documentation and procedures could include:
    - performance review templates/appraisal forms
    - one-to-one reviews or meeting logs
    - objectives/goals sheets
    - personal development plans (PDPs)
    - training needs analysis
    - disciplinary and capability procedures documentation
    - recognition/reward forms, for example, employee of the month nominations

    - performance review cycles - quarterly or annually
    - performance improvement plans (PIPs)
    - employee feedback/360° feedback mechanisms
    - training and development procedures
    - succession planning and talent identification frameworks

- **Effective listening** is the skill of actively focusing on what someone is saying, showing understanding and responding appropriately. It helps build trust, reduce misunderstandings and encourage open communication. Principles of effective listening could include:
  - giving full attention and avoiding distractions
  - using verbal and non-verbal cues, such as, eye contact, nodding and open body language
  - putting the person at ease
  - clarifying or paraphrasing to confirm understanding
  - providing feedback
  - avoiding interrupting
  - listening to understand, not just to reply

- **Feedback** is information given to someone about their performance, behaviour, or contribution, with the aim of reinforcing strengths or supporting improvement.
  - Types of feedback could include:
    - positive feedback, which acknowledges and reinforces good performance, behaviour or achievements
    - constructive feedback, which focuses on areas of improvement in a supportive and solution-focused way
    - formal feedback, which is structured feedback given through official channels, such as appraisals, performance reviews or disciplinary meetings
    - informal feedback, which is the day-to-day feedback given immediately and casually during operations or conversations
    - the use of 360-degree feedback, which is collected from multiple sources to give a full picture of performance, for example, peers, direct reports, supervisors and/or customers
  - Principles of effective feedback:
    - timely - given soon after the event, when it's most relevant

        - specific - focused on clear actions or behaviours
        - balanced - includes positives as well as areas to improve
        - constructive - delivered with the intention to help, not criticise
        - actionable - includes suggestions or support for improvement

- **Effective communication** means sharing information clearly and accurately so that the intended message is understood as intended, promoting good relationships and effective working practices.
    - Types of communication could include:
        - verbal communication - meetings, briefings, conversations, tone of voice and pace
        - non-verbal communication - body language, nodding, hand gestures, eye contact and smiling
        - written communication - staff magazines, newsletters, posters and notices
        - online communications - intranet, internal chat systems and emails
    - Principles of effective communication could include:
        - clarity - using simple, direct language that the audience can easily understand
        - conciseness - keeping communication brief and to the point, avoiding unnecessary details that could confuse the listener
        - consistency - ensuring that the message stays the same across all channels and to all audiences
        - appropriate tone and language - adjusting language, tone and formality to suit the audience and situation
        - active listening - giving full attention to the speaker, showing you are engaged and responding thoughtfully
        - feedback and two-way communication - encouraging responses and checking understanding by inviting feedback
    - Reasons why effective communication is important could include:
        - preventing misunderstandings and errors
        - building trust and morale
        - enhancing customer satisfaction
        - improving teamwork and productivity

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<tr><th colspan="2">Customers</th></tr>
<tr><th>Knowledge</th><th>Skills</th></tr>
<tr><td>K15 Understand the impact of service failure on hospitality businesses and identify how to develop and implement successful service recovery strategies<br><br>K16 Know how to use customer feedback as a competitive tool in the hospitality industry<br><br>K17 Understand how to identify, support, implement and evaluate hospitality marketing, sales strategies and techniques<br><br>K18 Understand what it means to champion the business and maintain comprehensive product / service, brand and market knowledge</td><td>S16 Actively seek, analyse and evaluate customer feedback and take appropriate action to improve quality of service and customer experience<br><br>S17 Maximise the impact of marketing strategies, evaluate and act on feedback</td></tr>
<tr><th colspan="2">On-demand test</th></tr>
<tr><td colspan="2">C7 The diverse target markets of hospitality businesses (K15, K16, K17)<br><br>C8 The purpose of market research (K15, K16, K17)<br><br>C17 Factors upon which customers measure performance and satisfaction (S16)<br><br>C18 Principles of measuring customer satisfaction and planning for improvements (S17)<br><br>C21 The difference between perception, reputation and performance (K18)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2"><ul><li>Target markets are specific groups of customers that a hospitality business aims to attract and serve. Each group has distinct needs, preferences and expectations that affect service style, pricing and promotions.<ul><li>Understanding target markets helps managers:<ul><li>tailor products and services appropriately</li><li>market effectively to different customer segments</li><li>anticipate and exceed customer expectations</li><li>maximise revenue opportunities</li></ul></li><li>Types of diverse customer groups could include:</li></ul></li></ul></td></tr>
</table>

        - leisure customers
        - business (corporate) customers
        - local community customers
        - special interest or niche groups
        - event or group bookings
    - Customer segmentation involves dividing a customer base into distinct groups based on shared characteristics or behaviours, enabling businesses to tailor marketing and sales efforts for better results.
        - Geographic involves dividing the market based on where customers live, work and travel, for example, local residents, domestic tourists and international travellers
        - Demographic involves grouping customers based on measurable characteristics, such as age, gender, income, occupation, family size, dietary preferences or pet ownership
        - Psychographic involves segmenting based on lifestyle, interests, values, attitudes and personality traits
        - Behavioural involves segmenting customers based on their interactions with the business, including purchase behaviour, loyalty, booking frequency or preferences

- **Market research** is the process of gathering and analysing information about customers, competitors and market trends to support informed business decisions.
    - Types of market research could include:
        - primary research is research that is gathered first-hand directly from customers or staff. Methods could include:
            - guest surveys and questionnaires
            - face-to-face interviews
            - mystery shoppers
            - focus groups
            - feedback forms
        - secondary research is research that uses existing data from external or internal sources. Methods include:
            - industry reports, for example, tourism trends or benchmarking data
            - social media analytics
            - competitor websites or menus

        - past booking and sales data
        - online reviews, for example, on TripAdvisor or Google
    - The purpose of market research could include:
        - understanding customer needs and preferences
        - identifying and targeting specific market segments
        - monitoring competitor activity
        - improving services and experiences
        - informing marketing and promotional campaigns
        - forecasting demand and trends

- **Customers measure performance and satisfaction** refers to how customers evaluate the service they receive throughout their service journey, which will influence their overall level of satisfaction. This could include:
    - speed and efficiency of service - how quickly and smoothly customers receive service, check-in, food or support
    - friendliness and professionalism of staff - customers judge performance based on staff attitude, behaviour, appearance and helpfulness
    - accuracy and constancy - customers getting what was promised and receiving the same quality each time
    - cleanliness and presentation - the appearance, hygiene and upkeep of the venue, facilities, staff and products
    - value for money - guests assess whether the quality and experience match the price paid, not necessarily if they believe it to be cheap
    - personalisation and attention to detail - when businesses anticipate or respond to individual preferences, it improves the emotional connection with guests
    - problem resolution - how well staff handle complaints or issues, including response time, empathy and resolution quality
    - communication and transparency - guests value clear, honest and timely information, especially when things go wrong

- **Customer satisfaction** refers to how well a guest's expectations are met or exceeded during their experience with a hospitality business. Understanding customer satisfaction is important because it affects customer loyalty, repeat business, reputation, informs decision-making and staff development. Methods to measure customer satisfaction could include:
    - quantitative methods (measurable scores or statistics):
        - customer satisfaction scores which are based on post-visit surveys
        - net promoter score (NPS), which measures the likelihood of guests recommending the venue

        - online ratings and reviews, for example, Google, TripAdvisor or booking.com
        - repeat booking data or loyalty membership activity
    - qualitative methods (test-based, opinion-led feedback):
        - open comments in surveys or feedback cards
        - online review comments
        - direct feedback from guests or staff
        - complaints or compliments logged during the visit

- **Planning for improvements** could include:
    - identifying trends - spotting repeated feedback (positive or negative) over time to prioritise actions
    - setting improvement goals - using specific, measurable, achievable, relevant and time-bound (SMART) targets to plan improvements
    - team involvement - sharing findings with the team and involving them in creating and delivering the improvement plan
    - monitoring and evaluation - tracking progress against improvement plans and measuring the impact of changes

- **Perception** is the individual view or impression a customer forms about a business, often based on first-hand experience or visual cues and shaped by emotions, expectations and personal values. Perception is subjective. Therefore, different guests may perceive the same service or space differently. It is defined by individual guests and affects immediate guest satisfaction.

- **Reputation** is the collective opinion or public image of the business formed over time, based on past guest experiences, reviews, social media and word-of-mouth. Reputation is built over time but can be influenced quickly (positively or negatively) by key events or viral feedback. It is defined by the public/community and influences bookings and brand trust.

- **Performance** refers to the actual results or outcomes achieved by the business, such as financial metrics, guest satisfaction scores, operational efficiency and service quality. Performance is measurable and based on internal data, for example, key performance indicators (KPIs), not just customer opinions. It is defined by the business and supports decision-making and improvement.

| Leadership | |
|---|---|
| **Knowledge** | **Skills** |
| **K19** Understand the management and **leadership styles** and skills required in a hospitality business environment<br><br>**K20** Understand how to lead the implementation of change in hospitality business and the potential impact on stakeholders | **S19** Use a wide range of management and leadership skills appropriate to the business to motivate and inspire others<br><br>**S20** Lead change to meet the business objectives and manage the impact of change on stakeholders |
| **On-demand test** | |
| **C22 Leadership styles**, their selection and application in a number of contexts (K19)<br><br>**C23** Principles of **motivation** (S19)<br><br>**C24** Principles of effective **change management** (K20, S20)<br><br>**C25** Principles of **empowerment** of team members (S19) | |
| **Amplification and guidance** | |

- **Leadership styles** are the approaches a manager takes to guiding, motivating and supporting their team. Different styles are suited to different teams, individuals and situations. This could include:
  - autocratic is where the leader makes decisions independently, with little input from the team. This is best used when quick decisions are needed or during emergencies.
  - democratic is where the leader actively encourages the team to be involved in the decision-making processes, often by seeking feedback and input and encouraging discussion. This is best used when building team morale, gathering ideas or solving non-urgent problems.
  - laissez-faire (hands-off) leaders give team members autonomy and independence to make decisions and manage tasks. This is best used when team members are highly experienced and capable of working independently.
  - transformational leaders inspire and motivate the team to achieve a shared vision through passion and innovation. This is best used when driving change or improving service culture.
  - transactional leaders focus on structured tasks, clear rules and reward/punishment systems to motivate team members. This is best used when managing repetitive tasks or ensuring compliance with procedures.

- **Motivation** is the drive or desire that influences people to act and perform well. In the workplace, it refers to what encourages employees to do their job with energy, commitment and enthusiasm.
    - Types of motivation could include:
        - intrinsic motivation - this comes from within the individual, driven by personal satisfaction, pride, or enjoyment of the work itself
        - extrinsic motivation - this comes from external rewards, such as pay, bonuses, recognition or promotion
    - Motivational theories could include:
        - Maslow's hierarchy of needs, which is the idea that employees are motivated by fulfilling a series of needs in order, from basic to more advanced:
            - physiological - fair pay and rest breaks
            - safety - job security and safe working environment
            - social - team relationships and sense of belonging
            - esteem - recognition and responsibility
            - self-actualisation - growth, development and achievement
        - Herzberg's two-factor theory is the idea that 2 sets of factors influence motivation:
            - hygiene factors - prevent dissatisfaction, for example, pay, working conditions or policies
            - motivators - create satisfaction, for example, recognition, achievement or personal growth
        - McClelland's theory of needs is the idea that people are motivated by 1 or more of these drivers:
            - achievement - driven to accomplish goals
            - affiliation - seek strong relationships and team belonging
            - power - motivated by influence or leadership

- **Change management** is the structured approach used to transition individuals, teams, or organisations from a current state to a desired future state. It helps ensure changes are adopted smoothly and sustainably.
    - Types of change could include:
        - introducing new booking or point-of-sale (POS) systems
        - updating menus, rotas or operating procedures
        - changing team structures or shift patterns
        - rolling out new policies, for example, sustainability or health and safety initiatives

        - adapting services following guest feedback or market trends
    - Principles of effective change management could include:
        - clear communication - explaining why, what, how and when of the change to everyone affected
        - employee involvement - involving the team in the process increases buy-in and reduces resistance
        - planning and preparation - outlining steps, resources and timeframes required for successful implementation
        - support and training - equipping staff with the skills and confidence to adapt to the change
        - monitoring feedback - reviewing the change once implemented and collecting feedback to improve the process
        - managing resources - understanding why some team members may be unsure or opposed to the change and addressing their concerns with empathy and clarity
    - Reasons why effective change management is beneficial could include how it:
        - keeps the business adaptable and competitive
        - supports the team through operational or strategic changes
        - minimises disruption to service, staff morale and customer experience

- **Empowerment** is the process of giving team members the authority, confidence, resources and support to make decisions, solve problems and take responsibility within their roles.
    - Principles of empowerment could include:
        - trust and delegation - managers must trust staff to make appropriate decisions and give them meaningful responsibilities
        - clarity and expectations - team members need a clear understanding of what is expected, where the boundaries are and what decisions they can make independently
        - access to tools, resources and information - empowerment requires that staff have the right training, systems and authority to act confidently
        - encouragement and support - empowerment involved coaching and encouragement, helping staff learn from decisions and grow professionally
        - recognition and feedback - acknowledging empowered behaviour reinforces confidence and builds a positive team culture
    - Benefits of empowerment could include:
        - improved guest satisfaction as issues are resolved quickly and confidently by the person present
        - increased engagement as the team member feels valued and trusted

- better productivity due to less micro-management being needed and more ownership being taken by team members
- faster decision-making, which is especially important during busy shifts or during peak service
- stronger team development because staff build more leadership and problem-solving skills

| Conference and events management |
| --- |
| **Knowledge** |
| **KCE1** Understand how to plan and implement multiple events to ensure best allocation and use of resources to meet demand<br><br>**KCE2** Identify required business levels and know how to track and analyse enquiries to fulfil them<br><br>**KCE3** Understand how to develop and maintain effective working relationships with suppliers, exhibitors and other **stakeholders** and why this is important for the business |
| **On-demand test** |
| **CE1 Planning** and **implementing** a **variety of conferences and events** (KEC1)<br>**CE2 Maximising available resources** across conference and events (KEC1)<br>**CE3 Managing and developing relationships** with conferencing and event **stakeholders** (KCE3)<br>**CE4 Managing the delivery and legislative requirements of offsite sales** (KEC2)<br>**CE5 Forecasting**, **tracking** and **analysing conference and event data** (KEC2) |
| **Amplification and guidance** |
| • **Stakeholders** are individuals or groups who have an interest in or influence on the planning, delivery or success of a conference or event. This could include:<br>  ○ internal stakeholders:<br>    ▪ Operations staff<br>    ▪ Front-of-house<br>    ▪ IT<br>    ▪ Duty managers<br>    ▪ Sales<br>    ▪ Marketing<br>    ▪ Project managers<br>    ▪ Board of directors<br>    ▪ Shareholders<br>  ○ external stakeholders:<br>    ▪ suppliers<br>    ▪ investors<br>    ▪ venue hire agents<br>    ▪ sponsors |

        - performers
        - speakers
        - clients/customers
        - partner organisations

- **Planning** is the process of organising the operational, logistical, financial and service aspects of an event to ensure a successful delivery that meets client expectations. This could include:
    - liaising with clients to understand objectives, guest numbers and preferences
    - preparing event proposals, function sheets and costings
    - booking rooms, resources and co-ordinating catering and staffing
    - creating event timelines and contingency plans
    - liaising with sales, marketing and operations teams to ensure alignment

- **Implementing** refers to putting the event plan into action, managing the live delivery of the event and ensuring all components run to time and to standard. This could include:
    - leading team briefings and assigning event-day responsibilities
    - overseeing event setup and transitions between sessions
    - managing suppliers, clients and delegates on-site
    - troubleshooting issues, for example, delayed deliveries or tech failures
    - ensuring post-event breakdown and feedback processes are completed

- **Variety of conferences and events** - managers must understand how to adapt their planning and delivery to suit the type, scale and purpose of the event. The types of conferences and events could include:
    - corporate conferences
    - networking events
    - weddings and private celebrations
    - product launches
    - award dinners or charity galas
    - training sessions or workshops
    - festivals
    - networking events
    - conventions

- **Maximising available resources** refers to using what is available as efficiently and effectively as possible to meet event goals without waste or overspending. This includes identifying how to get the most value from staff time, space, equipment and budgets.
    - Types of resources could include:
        - staffing - ensuring the correct number and skills mix of team members are available
        - venue space - effective use of rooms and areas
        - time - ensuring a timely delivery of each element of the event
        - equipment - ensuring the correct equipment is available, for example, audio/video (AV), furniture, signage and materials
        - suppliers - co-ordinating deliveries with various suppliers, for example, caterers, florists, speakers or entertainers and avoiding duplication of services
        - budgets - sticking to the agreed financial resources for the event
    - Principles of resource management could include:
        - advanced planning and scheduling - planning staff rotas, room usage and equipment in advance to reduce overlap and avoid last-minute issues
        - multi-use of assets - reusing equipment or spaces during the same event to reduce costs or increase flexibility
        - cross-functional teaming - using team members across functions where appropriate, for example, bar staff assisting with the event setup during quiet periods
        - monitoring utilisation - reviewing how well resources are sued to avoid underuse or overspending
        - flexibility and adaptability - responding to changes in guest numbers, timings or layouts by reallocating resources effectively

- **Managing and developing relationships** refers to overseeing the interaction and communication with stakeholders to ensure expectations, responsibilities and timelines are clearly understood and delivered, while proactively building and strengthening stakeholder partnerships over time, based on trust, collaboration and mutual benefit.
    - Ways to manage and develop relationships could include:
        - co-ordinating regular updates and meetings
        - confirming expectations and deliverables in writing
        - communicating changes clearly and early
        - managing conflicts or concerns professionally
    - Skills involved in managing and developing stakeholder relationship could include:
        - clear communication
        - negotiation and problem-solving
        - active listening
        - professionalism and trust building

- feedback and following up

- **Managing the delivery and legislative requirements of offsite sales**:
  - off-site sales refer to the events that take place outside the organisation's main venue or premises, where the hospitality business provides services, such as catering, staffing, furniture, equipment or full event co-ordination. This could include:
    - delivering catering and service for a wedding in a marquee
    - hosting a corporate drinks reception in a museum or historic building
    - setting up a branded stand and hospitality area at a trade show
  - delivery management refers to overseeing the planning and execution of all aspects of offsite event delivery, including logistics, staff, equipment and supplier coordination. This could include:
    - transporting food, beverages and equipment safely and legally
    - confirming site access, power supply, layout and facilities
    - briefing staff on location-specific procedures and service requirements
    - co-ordinating real-time setup and guest service
  - legislative requirements are the legal obligations that must be met when delivering hospitality services offsite. These are critical to ensure compliance, safety and professionalism. This could include:
    - Licensing Act
    - Food Safety Act
    - Food Hygiene Regulations
    - Health and Safety at Work etc. Act
    - Manual Handling Operations Regulations
    - Control of Substances Hazardous to Health (COSHH) Regulations
    - Provision and Use of Work Equipment Regulations (PUWER)
    - Relevant insurances and liabilities
    - Equality legislation
    - Consumer Rights Act
    - Consumer Protection from Unfair Trading Regulations
    - General Data Protection Regulation (GDPR)/Data Protection Act

        - Sale of Goods Act

- **Forecasting** involves predicting future business performance based on historical data, seasonal trends and known bookings. This is important because it supports resource planning, informs budgeting and sales targets and helps anticipate peak periods or low demand.
    - Types of forecasting could include:
        - demand forecasting - predicting the number of enquiries, bookings or attendees expected for future events
        - revenue forecasting - predicting how much income is likely to be generated from events in a given period
        - operational forecasting - estimating the resources and logistics required to support upcoming events
        - food and beverage forecasting - estimating how much food and drink will be needed for scheduled events
        - labour forecasting - predicting staffing needs for future events based on scale, complexity and timings
        - trend forecasting - using market research to predict future preference or behaviour

- **Tracking** is the ongoing monitoring and recording of event data as it occurs - before, during and after the event. Key metrics that may be tracked could include:
    - number of enquiries, confirmed bookings and cancellations
    - delegate attendance and no-show rates
    - event revenue and costs
    - guest feedback and satisfaction ratings
    - supplier performance and delivery records

- **Analysing conference and event data** involves interpreting collected data to identify trends, evaluate success and support continuous improvement. This is important because it informs decision-making for future events, helps improve profitability and guest satisfaction and supports evidence-based proposals for pricings, packages or service changes. Types of data could include:
    - operational data:
        - guest numbers
        - timings
        - service flow
    - financial data:

    - event budgets
    - costs
    - income
    - profit margins
  - sales and booking data:
    - enquiry volumes
    - conversion rates
    - cancellation trends
  - customer feedback
    - reviews
    - survey response
    - complaints
    - compliments
  - supplier performance data:
    - timelines
    - quality
    - accuracy
    - communication

| Business project | | |
|---|---|---|
| **Business** | | |
| **Knowledge** | **Skills** | **Behaviours** |
| **K2** Understand **how to manage finance and minimise costs within hospitality businesses**; identify the income streams and cost centres and **areas for potential waste or loss** within own area of business<br><br>**K3** Know the business strategy and its key competitors and how it fits within the wider hospitality industry in which it operates | **S1** Proactively seek and drive activities that support the achievement of the **business vision** and objectives, improve competitiveness, to meet financial targets<br><br>**S3** Develop and effectively communicate own plans and strategy to management team in order to harmoniously work towards achieving business objectives<br><br>**S4** Analyse, interpret and evaluate product / service sales and / or productivity data and information and use it to make recommendations for future planning e.g. of staff and resources, ideas for new initiatives, and drive business change<br><br>**S6** Monitor peaks and troughs in business levels to ensure operational plans allow service standards and resources to be maintained | **B4** Make decisions based on a sound analysis and judgement of available management information<br><br>**B6** Ability to make accurate forecasts based on current and future trends<br><br>**B7** Think ahead and demonstrate resourcefulness when developing plans<br><br>**B8** Use technology responsibly and take an interest in new developments that could support the business |
| **People** | | |
| **Behaviour** | | |
| **B10** Be solution focussed through **proactive risk management** personally and through others | | |

<table>
<tr><th colspan="6">Customers</th></tr>
<tr><th colspan="2">Knowledge</th><th colspan="2">Skills</th><th colspan="2">Behaviours</th></tr>
<tr><td colspan="2">K14 Determine the customer service journey and understand how to meet expectations, taking into account business requirements</td><td colspan="2">S16 Actively seek, analyse and evaluate customer feedback and take appropriate action to improve quality of service and customer experience<br><br>S18 Manage the targeted promotion of the brand and product / service to customers</td><td colspan="2">B16 Drive behavioural change through encouraging others to seek and act on feedback</td></tr>
<tr><th colspan="6">Leadership</th></tr>
<tr><th colspan="3">Skills</th><th colspan="3">Behaviours</th></tr>
<tr><td colspan="3">S20 Lead change to meet the business objectives and manage the impact of change on stakeholders</td><td colspan="3">B20 Pioneer business decisions and promote a positive attitude to change</td></tr>
<tr><th colspan="6">Conference and events management</th></tr>
<tr><th colspan="3">Skills</th><th colspan="3">Behaviours</th></tr>
<tr><td colspan="3">SCE1 Manage the planning and delivery of multiple events<br><br>SCE2 Track and analyse enquiries to fulfil forecast business levels<br><br>SCE3 Manage relationships with a variety of organisations and stakeholders such as suppliers and exhibitors</td><td colspan="3">BCE1 Is highly organised and proactive, anticipating and solving problems quickly to ensure stakeholder satisfaction</td></tr>
<tr><th colspan="3">Pass criteria</th><th colspan="3">Distinction criteria</th></tr>
<tr><td colspan="3">BP1 Explain how the business fits into the hospitality industry, both from a local and national perspective<br><br>BP2 Demonstrate an awareness of and understanding for the need for deadlines<br><br>BP3 How the apprentice keeps up to date with trends and the changing industry<br><br>BP4 Outline the problem, challenge or opportunity identified</td><td colspan="3">BP12 Outline the current situation which has led to the identification of a challenge or opportunity<br><br>BP13 Provide detailed aims and objectives for the proposal, linking to the current situation<br><br>BP14 Identification of measurable improvements and benefits to the organisation</td></tr>
</table>

| | |
|---|---|
| **BP5** Identify how the potential changes would lead to measurable improvements and benefits to the department and wider hospitality business<br><br>**BP6** Consult relevant stakeholders (e.g. customers, team members, managers) to inform the results and recommendations and explain how their feedback informed the outcomes<br><br>**BP7** Provide a **detailed analysis of costs** associated with the proposed recommendations<br><br>**BP8** Identify applicable legislation and ensure the proposal complies where necessary<br><br>**BP9** Make clear recommendations for implementation<br><br>**BP10** Concise validation and justification of recommendation<br><br>**BP11** Set out proposed timeframes for implementation | ***BP15*** *Review the proposal to ensure it meets organisational and legal requirements*<br><br>***BP16*** *A thorough analysis of costs and benefits of the recommendations in the short, medium and long term*<br><br>***BP17*** *Critically analyse the proposal to ensure it meets organisational and legal requirements*<br><br>***BP18*** *Include data acquired using qualitative and quantitative research*<br><br>***BP19*** *Show a range of research has been used effectively, including obtaining information from stakeholders, such as team members, management, suppliers or customers*<br><br>***BP20*** *Make detailed recommendations for implementation, including timings and potential costs*<br><br>***BP21*** *Comprehensive link from the project into the medium term strategy of the organisation*<br><br>***BP22*** *Detailed recommendations for implementation*<br><br>***BP23*** *Detailed validation and justification of recommendations* |

**Amplification and guidance**

- **How to manage finance and minimise costs within hospitality businesses** could include:
  - managing finances is the process of planning, organising, directing and controlling financial activities to achieve business objectives, to ensure profitability, sustainability and alignment with the business's financial targets. Key activities could include:
    - budgeting - creating financial plans that outline expected revenue and expenses over a specific period
    - forecasting - predicting future revenue, costs and profits based on historical data and market trends
    - financial reporting - producing profit and loss statements, balance sheets and cash flow reports to monitor financial performance
    - cost control - implementing measures to reduce expenses without compromising service quality
  - minimising costs is the process of implementing strategies to reduce unnecessary spending and improve efficiency while maintaining operational standards to maximise profitability by reducing overheads, resource waste and inefficient processes. Key strategies could include:
    - negotiating with suppliers - securing better pricing for bulk orders or long-term contracts
    - energy management - implementing eco-friendly practices to reduce utility bills

        - labour cost control - optimising staff schedules to match demand levels and avoid overstaffing
        - inventory management - ensuring stock levels are monitored and controlled to prevent over-ordering and spoilage

- **Areas for potential waste or loss** are activities or processes where resources are wasted or revenue is lost due to inefficiencies, poor management or errors. This could include:
    - food waste - over-preparation, spoilage, incorrect storage or poor portion control
    - energy waste - excessive use of heating, cooling or lighting when not needed
    - theft or fraud - misuse of resources or intentional theft by employees or customers
    - poor inventory management - over-ordering, expired stock or inadequate tracking of supplies
    - poor management - mismanaged bookings, customer no-shows, customer refunds or poor staffing levels
    - equipment maintenance - equipment or resources being incorrectly used, not maintained, damaged or stolen

- **Business vision** is the long-term aspiration or strategic direction of the organisation, how it sees itself and would like to be seen by customers, including the goals that a business sets for future success, focusing on areas like customer satisfaction, profitability, sustainability or brand reputation.

- **Proactive risk management** refers to the anticipation and prevention of potential problems before they occur, rather than only responding after an issue arises. This could include:
    - identifying risks during planning, for example, overbooking, staff shortages, weather or safety issues
    - conducting formal or informal risk assessments
    - putting contingency plans in place
    - monitoring early warning signs and acting quickly

- **Improve quality of service** refers to implementing changes or new approaches to enhance customer satisfaction and exceed expectations. Data and information leading to service quality improvement can be collected using various methods. This could include:
    - measurement factors
    - reviews
    - surveys
    - feedback
    - customer service
    - trends

- **Trends** refer to the broader evolution of hospitality operations, standards and expectation, which are influenced by economic, social, technological, legal and environmental factors.
    - Examples could include:
        - new health and safety regulations, for example, allergen labelling laws
        - growth of hybrid and virtual events in conference settings
        - rising guest expectations for sustainability credentials
        - increases in demand for local sourcing and provenance
        - shifts in recruitment and retention approaches
    - Keeping up-to-date with trends involves actively seeking out new information and insights on a regular and structured basis to remain aware of innovations, best practice and customer expectations. This could include:
        - reading industry publications
        - attending trade shows, conferences or webinars
        - participating in networking groups
        - following hospitality trends via social media and podcasts
        - benchmarking against competitors and market leaders
        - liaising with suppliers about new products and trends
        - monitoring customer feedback to identify new expectations

- **Detailed analysis of costs** is the process of providing a thorough breakdown and explanation of all costs related to the project recommendations and not just headline figures.
    - This could include:
        - itemising each cost (what, how much, and why?)
        - explaining how costs were calculated
        - highlighting any ongoing or future costs (not just initial spend)
    - Costs are the financial resources needed to implement a recommendation. These could be direct costs (specific purchases or services) or indirect costs (knock-on impacts like increased labour or utility use). Types of costs could include:
        - capital costs (one-off), for example, equipment purchases, venue refurbishments and marketing materials
        - operation costs (ongoing), for example, staff wages, utilities, cleaning and stock replenishment
        - training costs, for example, external courses and in-house training resources
        - maintenance costs, for example, servicing new equipment and repairs

| |
|---|
| ▪ licensing or compliance costs, for example, event licences and health and safety certification<br>▪ marketing costs, for example, promotions, social media advertising and new brochures |

## Professional discussion

The professional discussion will recognise areas which have already been covered in the business project so as not to re-assess an area in which the apprentice has already demonstrated competence.

| Professional discussion | | |
|---|---|---|
| **Business** | | |
| **Knowledge** | **Skills** | **Behaviours** |
| **K1** Understand how to use relevant **operating models** to help achieve the business vision and objectives of hospitality businesses and how these are used in own area of business<br><br>**K4** Identify the **management information** available in own area and understand how to use, analyse and act on it to drive business change<br><br>**K5** Understand the standard business operating procedures, the services and products and how they are managed and their potential consequences<br><br>**K8** Understand how **technology** supports the delivery of products and services in hospitality businesses | **S1** Proactively seek and drive activities that support the achievement of the business vision and objectives, improve competitiveness, to meet financial targets<br><br>**S2** Monitor and manage income and costs, use forecasting to set realistic targets, evaluate the control of resource allocation, and prepare financial cases for improvement projects<br><br>**S3** Develop and effectively communicate own plans and strategy to management team in order to harmoniously work towards achieving business objectives<br><br>**S5** Implement required **operational processes and procedures** in line with business standards<br><br>**S6** Monitor **peaks and troughs in business levels** to ensure operational plans allow service standards and resources to be maintained | **B1** Inspire team members to demonstrate personal drive to achieve the business vision and objectives<br><br>**B2** Be financially astute in work activities, visibly discourage waste and act credibly on matters that affect business finance<br><br>**B3** Openly share information with colleagues that support business objectives and growth<br><br>**B5** Actively promote the benefits of working within standard business operating procedures<br><br>**B6** Ability to make accurate forecasts based on current and future trends<br><br>**B7** Think ahead and demonstrate resourcefulness when developing plans<br><br>**B8** Use **technology** responsibly and take an interest in new developments that could support the business |

| | | |
|---|---|---|
| | **S7** Develop and implement contingency plans to ensure resources are in place to provide consistent levels of service required by the business<br><br>**S8** Maximise the use of **technology** and evaluate its effectiveness for achieving the desired results | **B9** Be accountable, advocate and adhere to the importance of working legally in the best interest of all people |
| **People** | | |
| **Knowledge** | **Skills** | **Behaviours** |
| **K13** Understand the responsibilities of an employer and the parameters the business works within | **S10** Identify and manage risks through empowering the team<br><br>**S11** Carry out **talent management planning** in line with the people strategy, and develop a culture of continuous development, actively supporting team members to improve and grow within their roles and careers<br><br>**S12** Demonstrate effective methods of communication and leadership that achieve the desired results, providing support and coaching to team members to maximise their performance<br><br>**S13** Manage people performance and capability, and develop teams in line with operational policy and procedures and support appropriate decision making | **B11** Demonstrate commitment to self-improvement, championing a culture of continual development and progression; trying out and reflecting on methods to develop own **leadership skills**<br><br>**B12** Manage team to take a pride in their role through demonstrating a consistently positive and professional approach to communication<br><br>**B13** Empower team members whilst providing adequate support to aid their decision making |

| Customers | | |
|---|---|---|
| **Knowledge** | **Skills** | **Behaviours** |
| **K14** Determine the **customer service journey** and understand how to meet expectations, taking into account business requirements | **S14** Monitor customer satisfaction to ensure product/service is delivered according to their profile and business requirements<br><br>**S15** Develop and implement service recovery strategies to uphold brand/business reputation and maintain customer satisfaction<br><br>**S18** Manage the targeted promotion of the brand and product/service to customers | **B14** Proactively develop and maintain a customer centred culture<br><br>**B15** Provide clear direction to team and empower them to implement effective customer service resolutions<br><br>**B17** Personally market the business and industry through creating a culture of passionate enthusiasm to provide customers with the best possible experience, seeking and acting upon feedback<br><br>**B18** Drive a strong cultural belief in the brand and product/service |
| **Leadership** | | |
| **Knowledge** | **Skills** | **Behaviours** |
| **K20** Understand how to lead the implementation of change in hospitality business and the potential impact on stakeholders<br><br>**K21** Understand the ethos of a diverse and inclusive culture that demonstrates social inclusion | **S19** Use a wide range of management and **leadership skills** appropriate to the business to motivate and inspire others<br><br>**S21** Support team members to carry out work activities that respond to a diverse range of needs | **B19** Create a high performance culture<br><br>**B20** Pioneer business decisions and promote a positive attitude to change<br><br>**B21** Lead by example to promote business and social responsibility and act as a role model to ensure self and team are operating in an empathic, fair and consistently professional manner |

| Conference and events management | | |
|---|---|---|
| **Knowledge** | **Skills** | **Behaviours** |
| **KCE1** Understand how to plan and implement multiple events to ensure best allocation and use of resources to meet demand<br><br>**KCE2** Identify required business levels and know how to track and analyse enquiries to fulfil them<br><br>**KCE3** Understand how to develop and maintain effective working relationships with suppliers, exhibitors and other stakeholders and why this is important for the business | **SCE1** Manage the planning and delivery of multiple events<br><br>**SCE2** Track and analyse enquiries to fulfil forecast business levels<br><br>**SCE3** Manage relationships with a variety of organisations and stakeholders such as suppliers and exhibitors | **BCE1** Is highly organised and proactive, anticipating and solving problems quickly to ensure stakeholder satisfaction |

| Pass criteria | *Distinction criteria* |
|---|---|
| **PD1** Clearly articulate examples from the workplace relevant to evidencing competence across the standard<br><br>**PD2** Explain why it is essential to instil the importance of company vision, values, empowerment and following procedures to staff<br><br>**PD3** Give examples of how staff are managed effectively, including motivation and development of teams and individuals<br><br>**PD4** Discuss reasoned examples of how the hospitality department operates efficiently<br><br>**PD5** Explain the importance of keeping up to date with current industry trends and refer to examples of how this has been achieved<br><br>**PD6** Provide an overview of how the hospitality department meets the needs of the business and supports the diverse range of customers including those with a disability | ***PD13*** *Proactively keeps up to date with industry developments, trends and business objectives*<br><br>***PD14*** *Explains how effective hospitality management, contingency planning, motivation and adherence to company/brand standard have been developed and implemented and how this has decreased waste and increased overall team/departmental performance*<br><br>***PD15*** *Describe how recommendations for the improvement of quality, cost, value or efficiency have been made in the organisation*<br><br>***PD16*** *Demonstrate how a proactive approach to planning and management has been implemented, including proactively educating and monitoring staff on customer service, brand standards, health and safety and risk matters beyond the legislative minimum*<br><br>***PD17*** *Discuss examples of when improvement activities have been actively sought to develop own performance to raise standards in team performance, reaching objectives and customer service* |

| | |
|---|---|
| **PD7** Explain how and when they have been part of the effective planning and review in the team<br><br>**PD8** Describe how the hospitality department meets regulatory requirements<br><br>**PD9** Evidence effective day to day management of the team/department and how these lead to customer satisfaction and ensure business performance<br><br>**PD10** Reflect on own performance, including behaviours, identifying where opportunities for improvement have been taken and results thereof evaluated<br><br>**PD11** Demonstrate how feedback has been sought from managers and customers and how this has been effectively dealt with<br><br>**PD12** Reflect and discuss the feedback received from a superior, a peer and a direct report | ***PD18*** *Provides mentorship to team members with measurable improvements to the performance of individuals and the team*<br><br>***PD19*** *Proactively invite feedback from all stakeholders and use this to develop and implement measurable improvements in performance of self and team*<br><br>***PD20*** *Describe how feedback has been used to categorise strengths and weaknesses, linking them to learning and development objectives*<br><br>***PD21*** *Explain how feedback will inform future development referring, if relevant, to the final feedback received from superior, peer and direct report* |

**Amplification and guidance**

- **Operating models** refers to how an organisation delivers value to its customers and achieves its business objectives. It encompasses organisational structure, processes, systems, technology and resources used to provide consistent and efficient services. This could include:
  - lean operating model - this focuses on eliminating waste, improving efficiency and optimising processes
  - customer-centric model - aims to enhance guest satisfaction by tailoring services to meet customer needs and preferences
  - quality management models - focuses on achieving consistent service quality through continuous improvement, employee involvement and process standardisation, for example, total quality management (TQM)
  - agile operating model - prioritises flexibility and responsiveness to changing customer expectations or market conditions
  - integrated service model - ensures seamless collaboration between various departments to provide a unified customer experience
  - franchise-based operating model - where hospitality establishments operate under a broader brand's guidelines, standards and marketing frameworks while maintaining some operational independence

- **Management information** refers to the data and reports that provide insight into business performance. It helps managers monitor results, track trends and make informed decisions.

- Examples of management information could include:
    - financial data, for example, revenue, labour costs and gross profit margins
    - sales reports, for example, product performance and upsell rates
    - customer feedback, for example, review scores and survey responses
    - operational reports, for example, stock usage, rotas and wastage levels
    - human resources (HR) data, for example, absenteeism and staff turnover

- **Technology** includes a range of digital systems, software, devices and platforms that help manage and deliver services or products efficiently and effectively.
  - Examples could include:
    - Property Management Systems (PMS)
    - Point of Sale (POS) systems
    - Customer Relationship Management (CRM) tools
    - Online booking engines
    - Feedback and review platforms
    - Digital ordering or payment systems
    - Staff scheduling and payroll software
  - How technology supports delivery of products and services could include:
    - Increases speed and accuracy, for example, digital orders go straight to the kitchen
    - Improves communication, for example, service alerts, internal messaging systems
    - Enhances the guest experience, for example, mobile check-in, self-service kiosks
    - Supports customisation and upselling, for example, guest preferences stored in CRM
    - Enables data tracking for performance analysis and forecasting

- **Operational processes and procedures** are the step-by-step instructions or routines used to carry out day-to-day tasks within a hospitality business. They are often formalised as standard operating procedures (SOPs). Examples could include:
  - guest check-in/check-out
  - food safety and handling

- health and safety, for example, fire drills and checking equipment
- cleaning and housekeeping routines
- cashing up, till reconciliation and banking
- setting up function spaces or dining areas
- stock control and ordering

- **Peaks and troughs in business levels**:
  - peaks are periods of high demand, such as weekends, holidays or event seasons
  - troughs are quiet periods, where customer numbers, bookings or revenue are lower than average
  - the things managers monitor could include:
    - booking levels and walk-ins
    - occupancy rates
    - sales trends and forecasts
    - event calendars or seasonal factors
    - staffing levels versus demands
    - guest wait times or complaints
  - tools that can be used could include:
    - point of sale (POS) and booking systems
    - weekly trading reports
    - forecasting sheets
    - customer feedback platform

- **Talent management planning** is the process of identifying, developing and retaining employees who have the potential to grow within the business. It supports long-term success by ensuring the right people are in the right roles now and in the future. This could include:
  - devising succession planning for key roles
  - implementing development plans for team member with high potential
  - using cross-training for retention and flexibility
  - identifying and supporting underperforming staff with potential

- holding annual talent review meetings
- involving staff in project-based development

- **Leadership skills** could include:
  - the ability to communicate and clearly share information, expectations and feedback in a way that motivates and guides others
  - decision-making and the ability to make timely, effective and fair choice under pressure
  - delegation and assigning responsibilities to team members based on their skills and development needs
  - emotional intelligence and the ability to recognise, understand and manage your own emotions and those of others
  - supporting team members to improve by guiding them rather than giving direct instructions through coaching and mentoring
  - the ability to resolve and manage disagreements/conflicts and reach a positive outcome
  - staying flexible and effective in changing circumstances or during unexpected challenges
  - inspiring team members to perform at their best and stay engaged
  - strategic planning and being able to see the bigger picture and aligning team members actions with business goals
  - the ability to self-reflect and evaluate your own performance, learn from experiences and take actions for improvement

- **Customer service journey** is the complete experience a customer has with a business, from their first interaction through to aftercare. This journey includes every touchpoint where a customer engages with the business, directly or indirectly. This could include:
  - pre-arrival, such as enquiry, website or booking confirmation
  - arrival and welcome
  - core experience, such as dining, accommodation or event attendance
  - issue handling (if needed)
  - departure and feedback
  - post-visit follow-ups, such as thank-you emails or loyalty rewards

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# Assessment summary

The end-point assessment for the Hospitality Manager - Conference and Events Management apprenticeship standard is made up of 3 assessment methods:

1. A 90-minute on-demand test, consisting of 35 scenario-based, multiple-choice questions
2. A 9,000 word (+/- 10%) business project
3. A 90-minute professional discussion

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit, which will be used to determine a grade for each individual. and a grade allocated. The grade will be determined using the combined grades.

## On-demand test

The on-demand test is comprised of 2 sections. Total marks available are 35.

- To achieve a **pass**, apprentice will score at least 18 out of 25 on the core hospitality manager section and 7 out of 10 on the pathway section.
- To achieve a **distinction**, apprentice must score at least 30 out of 35 across both sections
- **Unsuccessful** apprentices will have scored 24 or below

The test may be delivered online or be paper-based and should be in a 'controlled' environment.

## Business project

Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The business project should be conducted during work time and within the 2-month assessment window, to undertake the research and writing of the project and be allocated a quiet room with IT facilities within or away from the workplace.

## Professional discussion

Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The professional discussion may be conducted using technology, as long as fair assessment conditions can be maintained.

## Grading

The apprenticeship includes pass and distinction grades, with the final grade based on the apprentice's combined performance in each assessment method.

To achieve a pass, the apprentice is required to pass each of the 3 assessment methods.

The assessment activities are not 'weighted' in percentage terms. However, to achieve a distinction overall, the apprentice must perform to distinction level in the business project. To reflect this, the score available for the business project is higher at distinction level.

The overall grade for the apprentice is determined using the method below.

**Business project**

Score:

- pass = 1
- distinction = 3

**On-demand test**

Score:

- pass = 1
- distinction = 2

**Professional discussion**

Score:

- pass = 1
- distinction = 2

| Total score | Overall grade |
|---|---|
| 0 - 2 | **Fail** |
| 3 - 5 | **Pass** |
| 6 - 7 | **Distinction** |

## Retake and resit information

Should an apprentice fail 1 assessment activity, this should be resat as soon as the apprentice is ready, when practicable for the business and in line with Highfield policies, practices and procedures.

Should the apprentice fail 2 or more activities, a period of further training and development lasting between 1 and 3 months must take place before a retake of the whole end-point assessment. If the apprentice is completing a retake, they will require a period of further learning and will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

As the on-demand test is split into 2 separate papers, an apprentice will only need to resit the part of the on-demand test that they have failed.

When resitting/retaking an assessment activity the maximum grade that can be achieved for that activity is a pass. In the event of an exceptional circumstance causing the apprentice not to have had the full opportunity to undertake an assessment method, then they will not be graded for that method (meaning they are not given a fail or a pass). Instead, the assessment method will be re-arranged to take place as soon as possible. It is for the end-point assessor to decide if exceptional circumstances apply. This could be, for example, (but is not limited to) sudden ill health of the apprentice causing the assessment to breakdown.

Feedback will be provided on the areas of failure and a retake checklist will need to be submitted when the professional review has taken place.

Apprentices who achieve a pass grade cannot resit or retake the EPA to achieve a higher grade.

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## Assessing the on-demand test

The test consists of **35 scenario-based multiple-choice** questions and will last for **90 minutes**.

The on-demand test is split into 2 parts: core hospitality management questions and specialist function questions. Apprentices will sit 2 separate papers, 1 containing the **25 core management questions** and 1 containing the **10 specialist pathway questions**.

The **pass** mark is 25 out of 35 and the **distinction** mark is 30 out of 35. For each section they must achieve a minimum of:

- 18 out of 25 in the core management section
- 7 out of 10 in the specialist function section

The multiple-choice test may be delivered online or be paper-based and should be taken in a 'controlled' and invigilated environment. The test is closed book which means that the apprentice cannot refer to reference books or materials.

The topics covered within the test are listed below.

The core hospitality management section will consist of:

- business
- people
- customers
- leadership

The specialist function section will consist of:

- conference and events management

To achieve a **distinction**, apprentices must achieve a mark of **at least 30/35** (approximately 85%).

**Before the assessment**

- brief the apprentice on the areas that will be assessed by the knowledge test.
- in readiness for end-point assessment, set the apprentice a mock knowledge test. A test is available to download from the Highfield Assessment website. The mock tests are available as paper-based tests and also on the mock e-assessment system.

## On-demand test criteria

| Business |
| --- |
| **C1** The importance of business value and objectives |
| **C2** The need for performance targets and how these are commonly developed |
| **C3** How trends are incorporated into forecasting |
| **C4** How a financial strategy is prepared, including the risks, constraints and implications for policies |
| **C5** The financial data required to support decision making and forecasting in a hospitality business |
| **C6** The concepts of regularity and propriety, and the need for financial accountability |
| **C9** The importance of having a clear strategy for the business |
| **C10** The principles and purpose of a contingency plan |
| **C19** Legal and regulatory framework covering the hospitality industry |
| **C20** Legal and ethical principles governing marketing in the sector |

| People |
| --- |
| **C11** The content and importance of a risk management policy |
| **C12** The principles of effective risk management |
| **C13** The content and importance of a people strategy |
| **C14** The principles of recruitment, induction and performance management, including supporting documentation and procedures such as job and person specifications |
| **C15** The principles of effective listening, feedback and evaluation of team performance |
| **C16** Principles of effective communication |

| Customer |
| --- |
| **C7** The diverse target markets of hospitality businesses |
| **C8** The purpose of market research |
| **C17** Factors upon which customers measure performance and satisfaction |
| **C18** Principles of measuring customer satisfaction and planning for improvements |
| **C21** The difference between perception, reputation and performance |

| Leadership |
| --- |
| **C22** Leadership styles, their selection and application in a number of contexts |
| **C23** Principles of motivation |
| **C24** Principles of effective change management |
| **C25** Principles of empowerment of team members |

| Conference and events manager |
| --- |
| **CE1** Planning and implementing a variety of conferences and events |
| **CE2** Maximising available resources across conference and events |
| **CE3** Managing and developing relationships with conferencing and event stakeholders |
| **CE4** Managing the delivery and legislative requirements of offsite sales |
| **CE5** Forecasting, tracking and analysing conference and event data |

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## Assessing the business project

The project is designed to give the apprentice the opportunity to demonstrate their wider understanding of the business they are working in and in particular identify and 'think through' how an improvement could be made to the way it operates. The project must examine how the operations of the specialist function can be improved as part of the wider organisation.

The project should focus on an opportunity, challenge or idea which the apprentice considers will make an improvement to the business they are working in. It involves gathering/reviewing information and making recommendations to management. As a key element of the standard apprentices are required to think in business terms about the organisation and look for solutions to issues, problems, challenges or opportunities.

The project is not written or assessed until the end-point assessment process commences.

The project should follow a basic structure, which is outlined below. The length of the project should be **9,000 (+/-10%)** words. End-point assessors will only mark projects **up to 9,000 (+/- 10%)** words, at which point they will stop marking and only credit the criteria covered to that point. Projects which fall short of the word count will be marked in full, against all criteria.

The project will contain the following:

- introduction and background
- outline of challenge or opportunity
- aims and objectives
- identification of measurable improvements and benefits to the wider organisation
- evidence of consultation and engagement of stakeholders
- analysis of costs and commercial context
- legislative requirements explained and adhered to
- evidence of effective research
- justified recommendations for implementation
- proposed timeframes for implementation

The apprentice should be given sufficient time, (a minimum of **40 hours**, if required) during work time and within the 2-month end-point assessment window, to undertake the research and writing/typing of the project and be allocated a quiet room with IT facilities (if required) within or away from the workplace. It will be necessary for the apprentice to sign a statement confirming that they have been the author of the project.

Once the project is completed, the apprentice is required to submit the report to the independent end-point assessor no less than **7 days** in advance of the professional discussion.

The business project must be uploaded in PDF format and must be accompanied by the **written submission sheet** which is available to download from the Highfield Assessment website. This is to confirm that they are the author of the project.

**Before the assessment**

Highfield will make the following considerations when determining whether the project meets the requirements.

- Does the project focus on a problem, opportunity or idea on which the apprentice can develop realistic business recommendations for improvement?
- Will the apprentice be able to measure improvements and/or benefits to the organisation?
- Does the project give the apprentice the opportunity to access the highest attainable grade for the business project?
- Does the project give reference to improving the specialist function?
- Does the project proposal outline the intended approach to research and making recommendations?

## Grading the business project

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Business project' criteria).

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

## Business project mock assessment

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement. It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment and Highfield recommend that the apprentice experiences a mock business project in preparation for the real thing. The most appropriate form of mock assessment will depend on the apprentice's setting and the resources available at the time.

When planning a mock assessment, the employer/training provider should include the following elements:

- the apprentice should be given a relevant amount of time to complete their mock business project.
- the business project should be expected to total approximately **9,000 words** (+/- 10%). However, each section of the business project may be split into more accessible sections.
- consider allowing the mock assessment to be available to other apprentices, especially if it is not practicable for the employer/training provider to mark and assess a separate mock business project for each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. This should also be in line with assessment criteria outlined in the kit.
- follow the structure set out above in the written project section to ensure consistency and familiarity.

## Business project criteria

Throughout the business project, the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the business project by considering how the criteria can be met and reflecting on their past experiences.

| Business project |
|---|
| **To pass, the following must be evidenced.** |
| **BP1** Explain how the business fits into the hospitality industry, both from a local and national perspective<br>**BP2** Demonstrate an awareness of and understanding for the need for deadlines<br>**BP3** How the apprentice keeps up to date with trends and the changing industry<br>**BP4** Outline the problem, challenge or opportunity identified<br>**BP5** Identify how the potential changes would lead to measurable improvements and benefits to the department and wider hospitality business<br>**BP6** Consult relevant stakeholders (e.g. customers, team members, managers) to inform the results and recommendations and explain how their feedback informed the outcomes<br>**BP7** Provide a detailed analysis of costs associated with the proposed recommendations<br>**BP8** Identify applicable legislation and ensure the proposal complies where necessary<br>**BP9** Make clear recommendations for implementation<br>**BP10** Concise validation and justification of recommendation<br>**BP11** Set out proposed timeframes for implementation |
| ***To gain a distinction, the following must be evidenced*** |
| ***BP12*** *Outline the current situation which has led to the identification of a challenge or opportunity*<br>***BP13*** *Provide detailed aims and objectives for the proposal, linking to the current situation*<br>***BP14*** *Identification of measurable improvements and benefits to the organisation*<br>***BP15*** *Review the proposal to ensure it meets organisational and legal requirements*<br>***BP16*** *A thorough analysis of costs and benefits of the recommendations in the short, medium and long term*<br>***BP17*** *Critically analyse the proposal to ensure it meets organisational and legal requirements*<br>***BP18*** *Include data acquired using qualitative and quantitative research*<br>***BP19*** *Show a range of research has been used effectively, including obtaining information from stakeholders, such as team members, management, suppliers or customers*<br>***BP20*** *Make detailed recommendations for implementation, including timings and potential costs* |

| Business project |
| --- |
| ***BP21*** *Comprehensive link from the project into the medium term strategy of the organisation*<br>***BP22*** *Detailed recommendations for implementation*<br>***BP23*** *Detailed validation and justification of recommendations* |

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## Assessing the professional discussion

The professional discussion is a structured discussion between the apprentice and their independent end-point assessor. The discussion must be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

It allows the end-point assessor to ask the apprentice a minimum of **30 questions** in relation to:

- coverage of the standard (a minimum of **5 questions** per core section plus **5 questions** on specialist function). This includes:
    - business
    - people
    - customers
    - leadership
    - conference and events
- reflection on the superior, peer and direct report feedback (a minimum of **5 questions**)

The amount of questions asked during the professional discussion will vary according to the breadth and depth of the answers given (and how many follow on questions are required).

The professional discussion will typically last **90 minutes**.

The professional discussion will be conducted in a controlled environment, for instance, a quiet room, away from the normal place of work. The professional discussion may be conducted using technology, as long as fair assessment conditions can be maintained. Acceptable means of remote assessment include video conferencing/video calling and must include a two-way visual and audio link.

The professional discussion will recognise areas that have already been covered in the business project so as not to re-assess an area in which the apprentice has already demonstrated competence.

**Feedback**

At the planning meeting, the end-point assessor will give the apprentice a template to be used to collect the peer, superior and direct report feedback. The professional discussion feedback form template can be found on the Highfield website. The template will set out the areas that need to be covered within the feedback, as outlined below.

- A superior - a higher manager, area manager, human resource manager, company owner or director. If the apprentice does not have a superior, a main stakeholder, for example, prime customer, supplier or business associate, may be used instead
- A peer - someone of the same level in the organisation or in a similar organisation where a working relationship can be demonstrated
- A direct report - a member of the apprentice's team for whom they have line management responsibility

Prior to the professional discussion, but within the assessment window, the apprentice will gather constructive and objective feedback regarding their competence across the areas listed below from their superior, for example, line manager, a peer and a direct report. If the apprentice does not have a superior, a main stakeholder, for example, prime customer, supplier or business associate, may be used instead. The feedback itself is not marked but used by the apprentice to reflect on their developed knowledge, skills and behaviours.

- business
- people
- customers
- leadership
- specialist function specific criteria
- behaviours (for the core and specialist function)

Once the apprentice has collected the feedback, a copy must be sent to Highfield (electronically or by post) a minimum of **5 working days** before the professional discussion.

**Before the assessment**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

## Grading the professional discussion

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Professional discussion criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

## Professional discussion mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice experiences a mock professional discussion in preparation for the real thing. The most appropriate form of a mock professional discussion will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock professional discussion should take place in a suitable location.
- a **90-minute** time slot should be available to complete the professional discussion, if it is intended to be a complete professional discussion covering all relevant standards. However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock professional discussion and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use a minimum of **30 structured, 'open' questions** that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:
    - business
        - Explain why it is important to ensure procedures are followed in your organisation.
        - How does your hospitality department meet regulatory requirements?

        - How do you ensure you effectively manage the team on a daily basis?
        - Tell me about a time when you have made recommendations to improve the efficiency of the organisation.
        - How have you reflected and acted on the feedback you have received regarding your business knowledge?
    - people
        - How have you managed team members effectively?
        - Tell me about a time when you have developed your team's knowledge or skills.
        - Describe a time you have used motivation to manage staff.
        - Describe a time when your team have carried out effective planning and how this was undertaken.
        - Explain a time you have mentored a team member and the impact this had.
- customers
        - How do you support the development of a customer-centric culture?
        - Describe a time you have had to apply your knowledge of customer diversity.
        - How does your department meet the needs of the business?
        - Explain how your department provides support for customers with disabilities.
        - Explain how your department meets customer expectations.
    - leadership
        - Describe a time you have identified and acted upon areas for improvement.
        - How have you effectively sought feedback from managers?
        - How have you sought feedback from customers?
        - Explore how you reflected on the feedback you received from a superior.
        - What impact has stakeholder feedback had on you and your team's performance?
    - conference and events
        - Discuss how you plan and carry out multiple events to ensure resources are allocated and used effectively to meet demand.
        - How is the planning and delivery of events effectively managed by yourself?
        - Discuss how forecast business levels are fulfilled by tracking and analysing enquiries.

        - Explain the importance of developing and maintaining effective working relationships with stakeholders, including exhibitors, suppliers and other stakeholders.
        - Explain how you ensure you are highly organised.
        - Describe a time when you have ensured stakeholder satisfaction through being organised or by proactively problem solving?
    - feedback-based questions
        - Using feedback from your supervisor, reflect on how you ensure customer satisfaction.
        - Using your feedback, reflect on how you have developed an individual's knowledge or skills.
        - Reflect on how you have managed team members based on the feedback you received.
        - Using the feedback provided, reflect on how you have monitored customer satisfaction.
        - Explain how you have reflected and acted on the feedback you have received regarding your knowledge of customer feedback.
        - Using the feedback as a reflective tool, how have you sought feedback from senior leaders and how has this impacted your role?
        - Reflect on how you identify required business levels based on your feedback.

## Professional discussion criteria

Throughout the **90-minute** professional discussion, the assessor will review the apprentice's competence in the criteria outlined below.

The apprentice should prepare for the professional discussion by considering how the criteria can be met.

| Professional discussion |
| --- |
| **To pass, the following must be evidenced.** |
| **PD1** Clearly articulate examples from the workplace relevant to evidencing competence across the standard<br><br>**PD2** Explain why it is essential to instil the importance of company vision, values, empowerment and following procedures to staff<br><br>**PD3** Give examples of how staff are managed effectively, including motivation and development of teams and individuals<br><br>**PD4** Discuss reasoned examples of how the hospitality department operates efficiently<br><br>**PD5** Explain the importance of keeping up to date with current industry trends and refer to examples of how this has been achieved<br><br>**PD6** Provide an overview of how the hospitality department meets the needs of the business and supports the diverse range of customers including those with a disability<br><br>**PD7** Explain how and when they have been part of the effective planning and review in the team<br><br>**PD8** Describe how the hospitality department meets regulatory requirements<br><br>**PD9** Evidence effective day to day management of the team / department and how these lead to customer satisfaction and ensure business performance<br><br>**PD10** Reflect on own performance, including behaviours, identifying where opportunities for improvement have been taken and results thereof evaluated<br><br>**PD11** Demonstrate how feedback has been sought from managers and customers and how this has been effectively dealt with<br><br>**PD12** Reflect and discuss the feedback received from a superior, a peer and a direct report |
| ***To gain a distinction, the following must be evidenced*** |
| ***PD13*** *Proactively keeps up to date with industry developments, trends and business objectives*<br><br>***PD14*** *Explains how effective hospitality management, contingency planning, motivation and adherence to company / brand standard have been developed and implemented and how this has decreased waste and increased overall team / departmental performance*<br><br>***PD15*** *Describe how recommendations for the improvement of quality, cost, value or efficiency have been made in the organisation*<br><br>***PD16*** *Demonstrate how a proactive approach to planning and management has been implemented, including proactively educating and monitoring staff on customer* |

| Professional discussion |
|---|
| *service, brand standards health and safety and risk matters beyond the legislative minimum* <br><br> ***PD17*** *Discuss examples of when improvement activities have been actively sought to develop own performance to raise standards in team performance, reaching objectives and customer service* <br><br> ***PD18*** *Provides mentorship to team members with measurable improvements to the performance of individuals and the team* <br><br> ***PD19*** *Proactively invite feedback from all stakeholders and use this to develop and implement measurable improvements in performance of self and team* <br><br> ***PD20*** *Describe how feedback has been used to categorise strengths and weaknesses, linking them to learning and development objectives* <br><br> ***PD21*** *Explain how feedback will inform future development referring, if relevant, to the final feedback received from superior, peer and direct report* |

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