

~~08-61a~~ 09-09a.  
R-2/17/09  
W-2/15/10

## Undergraduate Distance Education Review Form

(Required for all courses taught by distance education for more than one-third of teaching contact hours.)

### Existing and Special Topics Course

Course: HRIM 406 Catering and Banquet Management

Received

Instructor(s) of Record: Dr. Stephen B. Shiring

FEB 06 2009

Phone: 7-2626

Email: sshiring@iup.edu

Liberal Studies

### Step One: Proposer

A. Provide a brief narrative rationale for each of the items, A1- A5.

1. How is/are the instructor(s) qualified in the distance education delivery method as well as the discipline?

Dr. Shiring has been instructed and tutored in distance education delivery by Dr. Mindy Wygonik, Instructional Design Center (IDC). He has worked with her individually at one-on-one sessions and at workshops. Dr. Shiring has been involved in the food service industry for nearly thirty years and has specific catering experience. He is the primary author of the text Introduction to Catering: Ingredients for Success.

2. How will each objective in the course be met using distance education technologies?

Each objective in the course will be met through a variety of applications, including case study application, quizzes, and one-on-one instructor – student interaction.

3. How will instructor-student and student-student, if applicable, interaction take place?

The instructor-student and student-student interaction will be completed while centering on a case study application. Each student will select a case study written by the instructor to simulate a catering function. As the student progresses through the course, a series of student module work assignments will be used to reinforce the material through its application of catering management tasks to complete the case study.

4. How will student achievement be evaluated?

Student achievement will be evaluated through the use of a case study application and quizzes. The student has the opportunity to select from one of five catering function scenarios (cases) written by and based on a “real world” function done by the instructor.

The student will progress through a series of nine module assignments designed by the instructor to simulate the typical catering management process used by all caterers in planning an event. Each module will guide the student independently through the seven catering management functions. The nine module assignments are supported by the content in the text Introduction to Catering: Ingredients for Success. The student will also have access to additional information the instructor has written to provide guidance in the completion of the case study. The supporting information includes PowerPoint files written to complement the text content, a catering manager event checklist designed to guide the student step-by-step in the completion of the seven catering management functions and finally, a series of catering forms (templates) created to provide step-by-step guidance in the entire process.

At the completion of each module, the student will submit the assignment to the instructor for evaluation. Each module assignment is evaluated using a rubric. After the instructor has evaluated the assignment, it will be returned back to the student with instructor-generated suggestions. The student will take each individual module assignment, make the recommended changes, and submit them again organized into a catering manager’s event report that will complete their final project assignment. In addition to the

individual assignments and the final catering management report, the student will complete a quiz at the end of each module to test their comprehension of the material.

In summary, each student will read the assigned text, review the accompanying PowerPoint files, communicate with the instructor and classmates for clarification, apply what they have learned using templates and checklists to the planning of a catering event (case study) and take a quiz to measure content comprehension. At the conclusion of the course, the student will organize the individual module assignments into a catering manager event report which will be the final project.

5. How will academic honesty for tests and assignments be addressed?

The quizzes will be set up in Web CT in order to randomize the question and the answer stems so that no two students can see the same question in the same order. Each student will be engaged in their own individual catering project and I will have one-on-one input with each student monitoring their progress.

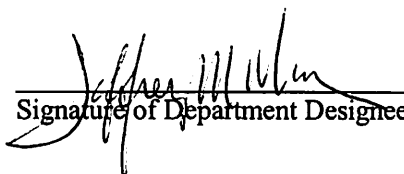
Submit to the department or its curriculum committee the responses to items A1-A5, the current official syllabus of record, along with the instructor developed online version of the syllabus, and the sample lesson. This lesson should clearly demonstrate how the distance education instructional format adequately assists students to meet a course objective(s) using online or distance technology. It should relate to one concrete topic area indicated on the syllabus.

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**Step Two: Departmental/Dean Approval**


Recommendation:  Positive (The objectives of this course can be met via distance education)

Negative

  
\_\_\_\_\_  
Signature of Department Designee

1-30-09  
\_\_\_\_\_  
Date

Endorsed:

  
\_\_\_\_\_  
Signature of College Dean

2-2-09  
\_\_\_\_\_  
Date

Forward form and supporting materials to Liberal Studies Office for consideration by the University-wide Undergraduate Curriculum Committee. Dual-level courses also require review by the University-wide Graduate Committee for graduate-level section.

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**Step Three: University-wide Undergraduate Curriculum Committee Approval**

Recommendation:  Positive (The objectives of this course can be met via distance education)

Negative

\_\_\_\_\_  
Signature of Committee Co-Chair

\_\_\_\_\_  
Date

Forward form and supporting materials to the Provost within 30 calendar days after received by committee.

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**Step Four: Provost Approval**

Approved as distance education course

Rejected as distance education course

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Signature of Provost

Date

Forward form and supporting materials to Associate Provost.

## ONLINE SYLLABUS

### I. Catalog Description

HRIM 406 Catering and Banquet Management

3 class hours  
3 semester hours  
0 lab hours  
3c-01-3sh

Prerequisite: Junior standing

A practical approach to the understanding of catering and banquet management tasks necessary to exceed the needs of the client through the delivery of food, beverage and related services.

### II Course Outcomes:

Students will be able to

1. Analyze the market to identify different types of niche caterers and their clients.
2. Summarize the variables used by the client to select a caterer for social, corporate, On-premise, Off-premise, mobile catering and seasonal niche business.
3. Appraise criteria a caterer relies on to select the right type of client and builds a customer base.
4. Plan a catering event from identification of client needs: concept to implementation
5. Evaluate market intermediaries and select suppliers based on predetermined factors.
6. Recognize risk associated with catering events: summarize insurance needs and identify related legal issues.
7. Formulate pricing strategies based on client needs.
8. Write a catering proposal.
9. Explain the various catering and banquet management forms used by successful caterers.

### III. Course Outline

Module One

(9 hours)

- A. Chapter 1 Types of Catering
  1. Catering Segments
  2. Exclusive Catering Rights
  3. Home-based Caterers

- B. Chapter 2 The Caterer and the Client
  - 1. Why Clients decide on a Caterer
  - 2. Deciding to Book the Event
  - 3. Types of Catering
- C. Chapter 3 Establishing a Catering Niche
  - 1. Who is the Caterer?
  - 2. Growing the Business
  - 3. Mission and Purpose
- D. Quiz
  - 1. Chapters 1, 2, 3
- E. Activity
  - 1. Complete Table 1

**Module Two**

- A. Chapter 4 Choosing the Client **(3 hours)**
  - 1. Creating a Customer Base
  - 2. Upgrading the Event
  - 3. Writing a Proposal
- B. Quiz: Chapter 4
- C. Activity
  - 1. Select catering function
  - 2. Complete event proposal

**Module Three**

- A. Chapter 5 Overview of Seven Functions of Catering **(6 hours)**
  - 1. Planning, Operations, Equipment
  - 2. Implementing & Controlling
  - 3. Insurance & Legal Issues
- B. Chapter 6 Catering Management Task: Planning
  - 1. Formulating a Catering Plan
  - 2. Barriers to Planning
  - 3. Hazardous Analysis Critical Control
- C. Quiz: Chapters 5 & 6
- D. Activity: Complete the following
  - 1. Catering Manager's Checklist Form A
  - 2. Time-Line Planning Form B

**Module Four**

- A. Chapter 7 Catering Management Task: Operations **(6 hours)**
  - 1. Operational Tasks
  - 2. Menu Design
  - 3. Flow of Food
- B. Quiz: Chapter 7
- C. Activity: Complete the templates/forms
  - 1. Menu Development -Form D
  - 2. Menu Item Recipe - Form E
  - 3. Menu Pricing & Recipe Conversion – Form F

- 4. Portion Control – Form G
- 5. Event Menu Production Control – Form H

**Module Five** (3 hours)

- A. Chapter 8 Catering Management Task: Organizing the Event
  - 1. Market Intermediaries
  - 2. Procurement
  - 3. Inventory Management
- B. Quiz Chapter 8
- C. Activity
  - 1. Complete the Market Purchase Order Form I

**Module Six** (6 hours)

- A. Chapter 9 Equipment
  - 1. Equipment & Design Considerations
  - 2. Equipment Storage
  - 3. Work Stations
- B. Chapter 10 Catering Management Task: Implementing
  - 1. Service Considerations & Styles
  - 2. Physical Facility Arrangement
  - 3. Creating an Employee-Supportive Culture
- C. Quiz: Chapter 9 & 10
- D. Activity: Complete the following templates/forms
  - 1. Concept & Theme Control Table Top Design – Form J
  - 2. Concept & Theme Control – Form K
  - 3. Event Control Uniform/Costume Apparel – Form L
  - 4. Event Control – Form M

**Module Seven** (3 hours)

- A. Chapter 11 Catering Management Task: Controlling
  - 1. The Financial Component
  - 2. Pricing the Event
  - 3. Control Techniques
- B. Quiz Chapter 11
- C. Activity: Complete the following templates/forms
  - 1. Event Cost-Pricing Worksheet – Form N
  - 2. Event Cost-Pricing Worksheet – Form O
  - 3. Event Pro-Forma Profit and Loss Worksheet – Form P

**Module Eight** (3 hours)

- A. Chapter 12 Catering Management Task: Insurance and Legal Issues
  - 1. Risks Management
  - 2. Insurance Services Officer (ISO)
  - 3. Contracts
- B. Quiz: Chapter 12
- C. Activity: Complete the Catering Contract – Form O

**Module Nine** (8 hours)

- A. Compile a Catering Manager's Report
- B. Activity: Complete Catering Manager's Form - R

## IV Evaluation Methods

The final grade for the course will be based on the following:

### Module 1

Quiz: Chapters 1, 2, 3 (10 point quiz per chapter) 30 points

Activity

Complete Table 1 25 points

### Module 2

Quiz: Chapter 4 10 points

Activity

1. Select catering function 15 points

2. Complete event proposal 15 points

### Module 3

Quiz: Chapters 5 & 6 (10 point quiz per chapter) 20 points

Activity

Complete the following

1. Catering Manager's Checklist Form A 25 points

2. Time-Line Planning Form B 25 points

### Module 4

Quiz: Chapter 7 10 points

Activity

Complete the templates/forms

1. Menu Development -Form D 20 points

2. Menu Item Recipe - Form E 20 points

3. Menu Pricing & Recipe Conversion – Form F 20 points

4. Portion Control – Form G 20 points

5. Event Menu Production Control – Form H 20 points

### Module 5

Quiz Chapter 8 10 points

Activity

Complete the Market Purchase Order Form I 20 points

### Module 6

Quiz: Chapter 9 & 10 (10 point quiz per chapter) 20 points

Activity

Complete the following templates/forms

1. Concept & Theme Control Table Top Design – Form J 20 points

2. Concept & Theme Control – Form K 20 points

3. Event Control Uniform/Costume Apparel – Form L 20 points

4. Event Control – Form M 20 points

### Module 7

Quiz Chapter 11 10 points

Activity

Complete the following templates/forms

1. Event Cost-Pricing Worksheet – Form N 20 points

2. Event Cost-Pricing Worksheet – Form O	20 points
3. Event Pro-Forma Profit and Loss Worksheet – Form P	20 points
<b>Module 8</b>	
Quiz: Chapter 12	10 points
Activity	
Complete the Catering Contract – Form O	20 points
<b>Module 9</b>	
Complete the Catering Manager’s Report Form R	100 points
Total Points	605 points

**V. Example Grading Scale**

- A = 90% to 100%
- B = 80% to 89%
- C = 70% to 79%
- D = 60% to 69%
- F = below 59%

**VI. Required Textbook**

Shiring, S.S., Jardine, R. W., & Mills, R., Jr. (2001). *Introduction to catering: Ingredients for success*. United States: Thompson Delmar Learning.

**VII. Special Resource Requirements**

None

**VIII. Bibliography**

Dittmer, P.R., & Keefe, J., III. (2005). *Principles of food, beverage, and labor cost controls* (8<sup>th</sup> ed.). New Jersey: John Wiley & Sons.

Feinstein, A. H., & Stefanelli, J. (2004). *Purchasing*. New Jersey: John Wiley & Sons, Inc.

Hanson, B., & Thomas, C. (2005). *Off-premise catering management* (2<sup>nd</sup> ed.). New Jersey: John Wiley & Sons, Inc.

Jagels, M. G. (2006). *Hospitality management accounting*. New Jersey: John Wiley & Sons, Inc.

Katsisgris, C., & Thomas, C. (2006) *The bar and beverage book*. New Jersey: John Wiley & Sons, Inc.

Lewis, R. (2005). *The foodservice and purchasing specification manual student edition*. New Jersey: John Wiley & Sons, Inc.



- Lynch, F. T. (2004). *The book of yields: Accuracy in food costing and purchasing* (6<sup>th</sup> ed.). New Jersey: John Wiley & Sons, Inc.
- Miller, J. E., Dopson, L. R., & Hayes, D. K. (2004). *Food and beverage cost control* (3rd ed.). New Jersey: John Wiley & Sons, Inc.
- National Restaurant Association Educational Foundation. (2006). *Servesafe' coursebook*. New Jersey: John Wiley & Sons, Inc.
- North American Meat Processors Association (NAMP). (2006). *The meat buyer's guide*. New Jersey: John Wiley & Sons, Inc.
- Paster, T. (2006). *The haccp food safety training manual*. New Jersey: John Wiley & Sons, Inc.
- Scanlon, N. L. (2006). *Catering management* (3<sup>rd</sup> ed.). New Jersey: John Wiley & Sons, Inc.
- Styler, S. (2006). *Working the plate: The art of food presentation*. New Jersey: John Wiley & Sons, Inc.
- Thomas, C. (2006). *Melissa's great book of produce*. New Jersey: John Wiley & Sons, Inc.

## **SYLLABUS OF RECORD**

### **I. Catalog Description**

HRIM 406 Catering and Banquet Management

3 class hours  
3 semester hours  
0 lab hours  
3c-01-3sh

Prerequisite: Junior standing

A practical approach to the understanding of catering and banquet management tasks necessary to exceed the needs of the client through the delivery of food, beverage and related services.

### **II Course Outcomes:**

Students will be able to

1. Analyze the market to identify different types of niche caterers and their clients.
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3. Appraise criteria a caterer relies on to select the right type of client and builds a customer base.
4. Plan a catering event from identification of client needs: concept to implementation
5. Evaluate market intermediaries and select suppliers based on predetermined factors.
6. Recognize risk associated with catering events: summarize insurance needs and identify related legal issues.
7. Formulate pricing strategies based on client needs.
8. Write a catering proposal.
9. Explain the various catering and banquet management forms used by successful caterers.

### **III. Course Outline**

- A. Types of Catering (3 hours)
1. Catering Segments
  2. Exclusive Catering Rights
  3. Home-based Caterers

- B. The Caterer and the Client (3 hours)  
 1. Why Clients decide on a Caterer  
 2. Deciding to Book the Event  
 3. Types of Catering
- C. Establishing a Catering Niche (3 hours)  
 1. Who is the Caterer?  
 2. Growing the Business  
 3. Mission and Purpose
- E. Choosing the Client (3 hours)  
 1. Creating a Customer Base  
 2. Upgrading the Event  
 3. Writing a Proposal
- F. Exam 1 (1 hour)
- G. Catering Management Task: Planning (3 hours)  
 1. Formulating a Catering Plan  
 2. Barriers to Planning  
 3. Hazardous Analysis Critical Control
- H. Catering Management Task: Operations (3 hours)  
 1. Operational Tasks  
 2. Menu Design  
 3. Flow of Food
- J. Catering Management Task: Organizing the Event (3 hours)  
 1. Market Intermediaries  
 2. Procurement  
 3. Inventory Management
- K. Exam 2 (1 hour)
- L. Furniture, Fixtures & Equipment (3 hours)  
 1. Equipment & Design Considerations  
 2. Equipment Storage  
 3. Work Stations
- M. Catering Management Task: Implementing (3 hour)  
 1. Service Considerations & Styles  
 2. Physical Facility Arrangement  
 3. Creating an Employee-Supportive Culture

- |    |  |           |
|----|--|-----------|
| N. | Catering Management Task: Controlling<br>1. The Financial Component<br>2. Pricing the Event<br>3. Control Techniques               | (3 hours) |
| O. | Catering Management Task: Insurance and Legal Issues<br>1. Risks Management<br>2. Insurance Services Officer (ISO)<br>3. Contracts | (3 hours) |
| P. | Exam 3   | (1 hour)  |
| Q. | Total Quality Management (TQM)<br>1. The Management System<br>2. Continuous Improvement<br>3. Relationship between TQM & Success   | (3 hours) |
| R. | Emerging Benchmarks and Trends<br>1. Reinventing the Catering Profession<br>2. Global Marketplace<br>3. Professional Development   | (3 hours) |
| O. | Culminating Activity<br>1. Comprehensive Final Exam – During Final Exam Week   | (2 hours) |

#### **IV Evaluation Methods**

The final grade for the course will be based on the following:

- 60% TESTS. Three tests – during the term. Each test will consist of multiple choice, completion, short essay, true-false and problem format
- 25% Comprehensive Final – administered during the final exam week, will consist of multiple choice, completion, short essay, true-false and problem format
- 10% Student Participation
- 100%

#### **V. Example Grading Scale**

- A = 90% to 100%
- B = 80% to 89%

C = 70% to 79%  
D = 60% to 69%  
F = below 59%

## **VI. Attendance Policy**

Although there is no formal attendance policy for this class, student learning is enhanced by regular class attendance and participation in class discussions. Attendance and class participation is recorded by the instructor. The instructor recognizes students' needs to miss class because of illness or personal emergency.

## **VII. Required Textbook**

Shiring, S.S., Jardine, R. W., & Mills, R., Jr. (2001). *Introduction to catering: Ingredients for success*. United States: Thompson Delmar Learning.

## **VIII. Special Resource Requirements**

None

## **IX Bibliography**

Dittmer, P.R., & Keefe, J., III. (2005). *Principles of food, beverage, and labor cost controls* (8<sup>th</sup> ed.). New Jersey: John Wiley & Sons.

Feinstein, A. H., & Stefanelli, J. (2004). *Purchasing*. New Jersey: John Wiley & Sons, Inc.

Hanson, B., & Thomas, C. (2005). *Off-premise catering management* (2<sup>nd</sup> ed.). New Jersey: John Wiley & Sons, Inc.

Jagels, M. G. (2006). *Hospitality management accounting*. New Jersey: John Wiley & Sons, Inc.

Katsisgris, C., & Thomas, C. (2006) *The bar and beverage book*. New Jersey: John Wiley & Sons, Inc.

Lewis, R. (2005). *The foodservice and purchasing specification manual student edition*. New Jersey: John Wiley & Sons, Inc.

Lynch, F. T. (2004). *The book of yields: Accuracy in food costing and purchasing* (6<sup>th</sup> ed.). New Jersey: John Wiley & Sons, Inc.

Miller, J. E., Dopson, L. R., & Hayes, D. K. (2004). *Food and beverage cost control* (3rd ed.). New Jersey: John Wiley & Sons, Inc.

National Restaurant Association Educational Foundation. (2006). *Servesafe' coursebook*. New

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HRIM 406 Catering and Banquet Management  
Module Two Assignment

- A. Read Chapter Four: *Choosing Your Client* in the text Introduction to Catering: Ingredients for Success pages 67- 90.
- B. Review Chapter Four's key terms
- C. Review the PowerPoint file which accompanies the fourth chapter of the text book. This file is entitled: Choosing Your Client.
- D. Review the End-of-the-Chapter questions (page 89) after reading the chapter and reviewing the PowerPoint files.
- E. Take the Quiz on Chapter Four
- F. Complete the Activity

## Objectives

1. Explain how a caterer can build a solid customer base using specific prospecting strategies.
2. Explain the details of a catering proposal.
3. Explain why the planned growth of a catering company is achieved through a conscientious building of satisfied customers and the accomplishment of a caterer's financial objectives.
4. Explain why a caterer may refuse to work for a particular client.
5. Define the difference between a client's needs, wants, and demands.

## **Activity**

Congratulations! You are now a caterer. Based on the Module One skills assessment, you have identified whether you are interested in on-premise, off-premise, social or corporate catering. Your first event is just a short time away!

Your assignment, for Module Two, is to select a catering function from the following list of events. The purpose of this assignment will be to guide you through the seven functions or tasks all caterers must do in order to efficiently and effectively execute the event (Chapter 5). After selecting the catering function, you will then complete the proposal based on the information obtained from the function selected.

Step one – select the event

Step two – complete the proposal

### **First**

Your first task is to select one of the following functions that you would like to create a catering plan for. Over the remaining weeks in this course, your task will be to write a plan to execute this catering function. By completing a series of module assignments and forms which are designed to guide you in each step of the planning process, you will complete the tasks necessary to implement this catering function.

The remainder of this course will guide you by using a series of forms or templates. As you plan your event and complete these forms, you will also need to make assumptions or assume additional information to help you complete the assignment. Some of these assumptions include:

1. You set the price per person based upon what you believe the menu and related services for the event should cost. No price restrictions on this assignment.
2. No food, ingredient or menu restrictions
3. Each event is 90 days or approximately 3 months away from the implementation date
4. You can plan each event using a theme, if desired. For example, the high school graduation party, Case C can be wrapped around a Fourth of July Celebration adhering to a patriotic theme.
5. See the file titled “Tips of the Trade” on the WebCt site for additional information to help guide you in the sequence of planning this event.



## **CASE STUDY CATERING FUNCTIONS**

**Select one of the following catering function events**

### **A. CORPORATE OFF-PREMISE CATERING FUNCTION**

**(Introduction to Catering: Ingredients for Success, page 40)**

#### **Event Summary**

This event is a corporate-sponsored event for 1500 employees, family and friends.

The American Steel Corporation is holding its annual employee recognition day at the local amusement park on a Saturday in August. The employee, their families and guests will attend the amusement park, ride the rides, and swim at the water park. The amusement park opens at 10:00 am and will close at 11:00 pm.

In conjunction with the annual employee day at the amusement park, American Steel Corp. also sponsors a barbeque dinner for all attending this event. In addition, this year's event coincides with American Steel Corp's 50<sup>th</sup> anniversary of continuous operation. The contact person for this event is the American Steel Corp's event planner, Ms. Laura Wagner. Her contact information is as follows:

Phone number is 724-76S-TEEL

Email: [lwagner@amsteel.com](mailto:lwagner@amsteel.com)

Address: 814 Allegheny Avenue, USA 15550

The guest forecast, based on the previous five-year records, indicates the following the following demographic mix:

60% of the guests are aged 40 and older

25% are aged 20 – 39

10% are aged 12 – 19

5% are aged 11 and younger.

#### **Pavilion Area**

The corporate planner wants the food served buffet style. The guests will be served from the amusement park's picnic pavilion area. Guests will be instructed to return to the pavilion area between the hours of 4:00 – 6:00 pm to eat. Each pavilion is under roof, has four open-screened sides, and seats 500 guests on long picnic-style tables. Guests are protected if it rains. The park has 10 pavilions; however, these must be reserved in advance. There is no rental fee for the use of the pavilion(s) for corporate/community days held at the amusement park. Each pavilion is numbered one through ten. Each pavilion has a potable water source. Sufficient bathrooms are located to service the pavilion area. The pavilions are available from 10:00 am until the park closes at 11:00 pm, however all must exit the park, even staff and caterers, at midnight.

#### **Price**

American Steel Corp. offers each employee the opportunity to purchase a reduced-price ticket to gain access to the park. For each ticket purchased, the employee will also

receive one meal ticket. American Steel Corp subsidizes each ticket as an employee benefit. The tickets are purchased from Ms. Laura Wagner in the corporate office. The corporation will pay the caterer for the food and beverage, as a benefit to the employee.

There is no restriction on what you can charge, however, if you execute this right, you most likely can become the primary caterer for this corporation. You will be invited to cater next year's picnic as well as other corporate events this company will have over the course of a year (holiday parties, employee seminars, management meetings – see Introduction to Catering: Ingredients for Success “TIPS FROM THE TRADE, page 37). Ms. Laura Wagner will issue payment for the event directly based on terms of the agreement.

### **Food Production**

For this job, all food, supplies, cooking and service equipment must be brought to the amusement park by the caterer. Your travel distance is two hours from your commissary location. As the caterer, you are permitted to prepare the food in the amusement park pavilion area, prior to service. Each of the park's pavilions has an adjacent charcoal grill, but these are small. You most likely will want to barbeque the food at the site. People love to see a caterer in action cooking the food over the charcoal pits.

Therefore, you will need to build your charcoal pits near each pavilion from which you will be serving from. A word of caution, make sure the charcoal pits are off-limits to all guests attending the amusement park. As part of your diagramming, you will certainly want to draw a diagram of the pits (see Figure 7-8, page 181, Introduction to Catering: Ingredients for Success).

All trash must be placed in garbage bags and assembled near the northern end of the pavilion area for removal by the park staff.

### **Special consideration**

First aid kit, burn ointment and a fire extinguisher is recommended. Sun screen or lotion helps protect employees working outdoors. Large brimmed logo hats are a good idea. You will feed your staff as well.

### **Suggestion to planning your event**

To control the flow of guests and the time they want to eat, you may want to coordinate with the event planner the distribution of meal tickets. Each guest must present one meal ticket to gain access to start their entry to the buffet meal. You can color code the meal ticket to correspond to the time of service. For example, a holder of a blue ticket is served from 4:00 – 5:00 pm, a red ticket from 5:00 – 6:00 pm and a yellow ticket from 6:00 – 7:00 pm. Thus, you can serve three shifts of 500 guests per shift. At the conclusion of the event, you can count the tickets to determine an accurate number of guests served.

**B. CORPORATE CLIENT ON-PREMISE FUNCTION**  
**(Introduction to Catering: Ingredients for Success, page 40)**

**Event Summary**

This event is a corporate-sponsored holiday event for 125 employees.

The USA Bank will hold its corporate holiday party (the third Saturday in December) for 125 senior staff members at your on-premise catering hall. The Food will be served American service. The event is being held in the Northeastern United States. Weather is always a concern at this time of the year. The contact person for this event is Ms. Julie Schmeal, the corporate president's secretary. The holiday meal will begin at 6:00 pm. The bank will reserve the banquet room from 5:00 pm through 10:00 pm. Ms. Schmeal wants you to have Santa & Mrs. Claus make an appearance after dinner to distribute gifts. She will bring the gifts, already wrapped with name tag, to the event. Santa can retrieve the gifts, put them into his bag, and distribute them after dinner. You might suggest having a dessert reception following dinner, a perfect time for Santa to mingle with the guests.

The contact person for this event is Ms. Julie Schmeal. Her contact information is as follows:

Phone number is 664-47B-KUSA  
Email: jschmeal@bankusa.com  
Address: 776 Patriot Lane, USA 17760

The guest forecast, based on the staff records, shows the following demographic mix:

70% of the guests are aged 50 and older  
20% are aged 39 - 49  
10% are younger than 38.

**Catering Facility/Banquet Hall**

Your catering facility has a banquet capacity of 1200 people. This facility can be partitioned into smaller rooms to accompany various-sized functions. In addition, you can have multiple events scheduled on the same day and at the same time, due to the large facility. Your banquet hall has a full production kitchen, portable bars, portable dance floors, and the in-house equipment to comfortably serve 1500 guests simultaneously. The facility also has sufficient parking space to accommodate your guests.

**Price Considerations**

Bank USA will issue payment directly to you according to the contract agreement. The bank will pay the entire cost of the event, which includes food, beverages, and the appearance of Santa & Mrs. Claus. You may want to ask if they desire some other form of complimentary entertainment. This event has no price restrictions.

## **C. SOCIAL OFF-PREMISE FUNCTION**

### **Introduction to Catering: Ingredients for Success, pages 41 - 44**

#### **Event Summary**

This high school graduation party begins at 5:00 pm for the class valedictorian, Malinda Medium and her family and friends. Of the 200 guests attending, 70% adults, 20% high school kids and 10% aged ten and younger. The event will be held at the home of the graduate the Saturday before the 4<sup>th</sup> of July. Food served buffet style. Although the party begins at 5:00 pm, there is not a scheduled time for the event to end. However the event should be over by 10:00 pm. The food will be served at 6:00 pm. The contact person for this event is the mother of the graduate, Matt Medium.

#### **Location**

The home of the graduate is relatively modest-sized. The father prefers to keep all of the guests out of his house utilizing their yard and garage area. The yard is large enough to accommodate those attending and the two car garage is of sufficient size for serving the food from the buffet tables or to use as a food prep area.

The caterer will not be permitted to use the kitchen area in the home. Guest will be permitted to use the bathrooms located in the finished basement and first-level of the home. Access to the bathrooms can be made using the cellar entrance or the first-floor entrance. The father and mother will have the home and subsequent areas cleaned and ready for use by the caterer on the day of the event. Due to concerns of heat and/or rain at this time of the year, the caterer may want to discuss the rental of a tent to be placed in the yard to provide protection from the weather. Tents can be provided with air conditioning units. In addition, portable bathroom units can be rented. The yard is 60 feet x 90 feet.

Your commissary is located 3 miles from this location. The home address is 1912 White Star Drive, USA 19866

Contract information is as follows:

Email – [mmedium@scenicexp.org](mailto:mmedium@scenicexp.org)

Phone – 876-439-2750

#### **Price Considerations**

The parents of the graduate will pay for the food. Although no specific details of the event have been discussed, you will have some options. First, you can prepare the food and just “drop it” at the site. Second, you can prepare, deliver and serve the food to the guests. Just dropping off the food and having the guests serve themselves will keep the price down. The parents would need to coordinate the cleanup of the event.

## **D. SOCIAL ON-PREMISE FUNCTION**

### **Event Summary**

A couple's golden wedding anniversary (50<sup>th</sup>) will be a surprise to them party to celebrate with children, family and friends this wonderful anniversary. The event will be held in a social organization's banquet room. This event will host 300 people and will begin at 5:00 p.m. Food served buffet style will begin at 6:30 pm. The event will most likely conclude by 10:00 pm. A professional photographer is needed to capture on film this important event. The contact person for this event is the oldest child, James Jr. The guests will include 45% aged 60 and older, 25% approximately aged 40 – 59 years old, and 20% aged 20 – 39, and 10% younger than 12.

The contact information is as follows:

James Ping Jr.

Address is 621 Fifth Avenue, USA 16888

Email – [jpings@fifth.com](mailto:jpings@fifth.com)

Phone – 724-887-9087

### **Location**

This event will be held in a social organization's banquet room. The family, which is comprised of the parents, four sons and two daughters, are members of this organization. The banquet room is located on the second floor of the building. The building has one elevator. The banquet room is large enough to accommodate 600 people. There is no production kitchen. However, a small prep area is available. There is a need to reserve the room prior to the event and a small refundable deposit (\$75) for the rental is required. Since this is a surprise celebration, all communication between the caterer and the oldest son of the family is required. The oldest son will take care of reserving the room and paying the room deposit directly to the social club prior to the event. The social club has a parking area which should be adequate for the guests to park their cars. Remember, however, the social club's bar and social rooms, located on the first floor, will be opened during the event.

### **Price Considerations**

The children of the couple celebrating their wedding anniversary will pay for this event.

The payment will be

## **E. SOCIAL OFF-PREMISE FUNCTION**

### **Event Summary**

Traveling to the National Boy Scout Jamboree at Fort A.P. Hill Virginia, a boxed lunch for 80 Boy Scouts (80% are aged 16 – 18 years old; 10% are aged 14 & 15 and 10% are aged 12 – 14) and 20 adult leaders (aged between 40 and 60 years old) and the driver of the bus (aged 45) is needed (101 total lunches). The contact person for this event is the Jamboree Contingent Scout Leader., Scoutmaster Joe Rustick.

His contact information is as follows:

Address – 470 Scout Lane, USA, 14446

Email – jrustic@scout.bsa

### **Location**

The scouts will be departing for the Jamboree from their council Boy Scout camp at 6:30 am. The scout camp is located in a rural area and is 20 miles from your commissary. The meals will be served at noon during a scheduled rest stop. The scouts and leaders have 45 minutes to eat their meal, use the rest room facilities, and talk with their friends, before boarding back on the bus to continue the trip. The caterer must have 101 boxed lunches at the scout camp no later than 5:30 am and must ensure they are loaded on the bus for proper transport.

The departure site, the Boy Scout camp, comfortably houses 300 scouts and leaders during a typical camping week in the summer. The camp has a modernized kitchen and dining facility. The kitchen area has adequate dry, refrigerated and frozen food storage areas. The food production area is equipped with professional food production equipment. It was recently remodeled. On the departure date for the Jamboree trip, the scout camping season will have concluded and the camp will not be occupied.

### **Price**

The price for the Jamboree trip for each scout includes transportation and all meals. The price of each boxed lunch is part of the overall scout's fee to attend this event. The Boy Scout Council has allocated money for the cost of each boxed lunch. The caterer will not be responsible for providing a beverage.

### **Select the function**

The catering event I have selected is \_\_\_\_\_ and the reason(s) why I selected this event is....

## **The Proposal**

A proposal is a communication tool used to effectively inform and educate the prospective client of everything the caterer can do for them during the particular event. The written proposal must communicate how the caterer intends to eliminate the client's concern about the implementation and successful execution of their function. It must realistically communicate how the caterer can exceed their needs.

The proposal is a detailed document. It must list everything the caterer will do. Every detail, from the beginning of the event to its concluding activity, either at the caterer's facility or at an off-premise facility, must be stated. The proposal communicates to the client a first-impression image of the caterer, and information it provides is used by the customer when choosing a caterer.

Complete the following proposal using information known to you at this time. The next module, Module Three will begin the planning stages and menu development for the event. You will be able to return to the proposal and complete those areas left blank as you move through the future modules.

# BASIC PROPOSAL – FORM C

Introduction to Catering: Ingredients for Success, Figure 4-8, pages 85- 85

Organization's Name \_\_\_\_\_  
Client's Name \_\_\_\_\_  
Day \_\_\_\_\_ Date \_\_\_\_\_ (function's day & date of execution)

## DEADLINE OR DUE DATE

Purpose of Function \_\_\_\_\_ Theme \_\_\_\_\_  
Function \_\_\_\_\_ (wedding, birthday, picnic, family reunion)  
Address \_\_\_\_\_  
Direction/Location \_\_\_\_\_ City \_\_\_\_\_  
State/Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_  
Method of Payment \_\_\_\_\_ (cash, credit card, check, barter, other)  
Party making the payment \_\_\_\_\_ (e.g., wedding—bride/groom's family, social event—Elizabeth 50% + Samantha 50%, celebration—Stephen 100% )

## Uniform Requirements

Wait staff \_\_\_\_\_ Food Production \_\_\_\_\_ Beverage Service \_\_\_\_\_  
Other \_\_\_\_\_  
Special Request \_\_\_\_\_ (e.g., Tammie's birthday, Bill & Joyce's anniversary)  
Starting and Ending Time \_\_\_\_\_ (exact starting and ending time)  
Location \_\_\_\_\_ (exact location of function, directions)  
Approximate Number of Guests \_\_\_\_\_ (best estimate, based on historical data)  
Minimum Number Expected \_\_\_\_\_ (minimum guest count for this event)  
\*Final guarantee number will be charged unless adjusted prior to 1:00 P.M. on \_\_\_\_\_ (last day for guest to adjust final count without penalty)

## Menu Requirements (All menu details as agreed upon with client)

Price Per Guest: \$ ( \_\_\_\_\_ ) (If quote per person, amount specified in this contract)  
All food and beverage subject to ( \_\_\_\_\_ %) sales tax and ( \_\_\_\_\_ %) service charge.  
Entree and Sides \_\_\_\_\_ (exact menu, portion size)  
Service Style \_\_\_\_\_ (explicit description of service responsibilities)  
Beverage Service \_\_\_\_\_ (nonalcoholic and alcoholic beverages and service)  
Set up Requirements \_\_\_\_\_ (any special requests, floor plan, and seating chart)  
Chefs—a flat \$( \_\_\_\_\_ ) labor charge will be assessed for each Chef required for buffet-line carving stations.



**Other Services**

Linen and Napkins \_\_\_\_\_

Skirting Requirement \_\_\_\_\_

Style of Plateware \_\_\_\_\_

Style of Silverware \_\_\_\_\_

Style of Glassware \_\_\_\_\_

Table Requirements \_\_\_\_\_

Chair Requirements \_\_\_\_\_

Tent Requirements \_\_\_\_\_

Audiovisual \_\_\_\_\_

Florist \_\_\_\_\_

Photographer \_\_\_\_\_

**Special Decorations and Service** (e.g., ice sculptures, hand-carved centerpieces, individualized flower arrangements, and thematic decorations).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Security \_\_\_\_\_

Valet Parking \_\_\_\_\_ Time \_\_\_\_\_

Guests \_\_\_\_\_

Entertainment \_\_\_\_\_

Weather Forecast \_\_\_\_\_

Update \_\_\_\_\_

**HRIM 406 Catering and Banquet Management**  
**Module 2 Assignment**  
**Evaluation Rubric**  
**30 points**

NAME \_\_\_\_\_

Criteria Score	Score	Your
<b>Section 1</b> Identify the catering function you have selected.....10 points Write a brief rational as to why you selected this function.....10 points <b>Section 2</b> Compete the basic proposal document.....10 points		
<b>Total</b>	<b>30</b>	
Deduction for each day the assignment is late.....5 points		

## **TIPS FROM THE TRADE**

Snippets help make a successful event.

1. Always know the exact site location of the event and the directions how to get there and back again.
2. The style of service, how it will be executed, and what is being served will determine service staff, skill level and number needed.
3. Review the availability of parking at each event location? Does the caterer have a reserved spot close to the function?
4. Confirm the final guest count.
5. Visit the kitchen or prep area of the off-premise location. What is the oven capacity? Do you have preparation space? Is cooler, freezer and storage space available?
6. Visit all off-premise locations prior to planning. Walk the steps to each level being used. Make sure all doors will be open. Review the emergency doors – do they open? Look the banquet room over. Is the elevator available when you need it?
7. How and where will the garbage be stored during the event? Who is responsible for moving it away from the event? Can it remain overnight? Are you permitted to return the next day to retrieve the garbage? Is the garbage exposed to wild animals, such as raccoons or bears? Is recycling mandatory?
8. You never have enough ice – especially on hot summer days! This instructor held an annual summer golf outing and this is one event when lots of ice is needed. Visit the ice supplier/maker to negotiate volume pricing slightly above their wholesale costs. If close to the event, ask if you can get ice “as needed” from their storage facilities and offer to transport it yourself.
9. Do you have janitorial supplies at the site or do you bring your own – such as brooms, mops, buckets, paper towels, dish soap, sanitizer solutions, vacuum cleaner, scrubbing pads, and garbage bags?
10. Always check an off-premise “kitchen” for adequate equipment, space, refrigeration and cooling storage areas – never take anyone’s word – always visit the location.
11. As part of your off-premise pre-function visit, make a map of convenience or food stores near the event site List the store, address, directions to and from the site, phone number of store and hours they are open. These can be valuable if you leave something back at the commissary, drop it, lose it, or run-out of something.

12. Review Figure 2-3a Sample catering checklist, pages 30 – 33 in the text to help you build an equipment list for an off-premise event.
13. Some caterers only serve decaffeinated coffee at events and pour this one beverage for all coffee service.
14. Any special requirements, such as children, pets, angry neighbors, zoning requirements, curfews, or burning ordinances?
15. Will you be required to notify the local police about the event? Are special permits needed to hold event in the city or borough limits?
16. Who is the contact individual responsible for the event? Do they make all final decisions? This instructor worked for a family-owned restaurant (fourteen brothers & sisters owned the restaurant) – who is in charge?
17. If you are working with an event planner or another contactor, make sure to be invited and involved in their planning sessions. At least obtain a final event schedule to be aware of all the activities involved and not just the preparation and service of the food. For example, if a parade is scheduled, will this limit the movement of your trucks to and from the site.
18. Tables, tables, and tables at off-premise events. Guest sit at tables, they set their plates, gifts, glasses, and desserts on them. Food preparation uses tables for plating service, preparation and cooking. Beverage service uses tables. Tables come in all sizes, shapes, and designs. Buffets are set on tables. An extra table never hurts to have if it fits on the truck.
19. If equipment is left at the site, who is responsible for it? Can you retrieve it the next day? Include this in a clause in the contract.
20. Schedule meetings with the client at the off-premise location. I have worked with Mr. Bill Jardine, coauthor of the text, who would schedule his food tasting event for the clients (to finalize their menu selections) at the off-premise site to “field test” an unfamiliar location.
21. Use checklists, room diagrams, buffet diagrams, seating charts, pre-function plan (list), ingredient list, shopping list, preparation list, equipment list, verification list (it was obtained from storage), checklist to verify it was loaded on the truck, checklist verifying it was put back on the truck after the event, checklist for putting it back in storage (after cleaned & sanitized), lists, lists, and more lists (see Tips from the Trade on pages 28 & 29 in the text Introduction to Catering: Ingredients for Success). As my favorite Uncle Tony always says “A short pencil is better than a long memory any day.”