This food service educational online resource will benefit food service business owners/managers to get consistency in their business and educate them with materials which would otherwise be only available through formal education. The purpose of this editable checklist is to educate food-service professionals in daily operations and assist to maintain consistency in a world where turnover is high and training resources are limited.

**Primary Audience:** Restaurant/Food-service owners/operators/managers.

**Topics for editable checklist include:** Purchasing and ordering for food service operations, receiving goods, storing goods, front-of-the house preparation, back-of-the house preparation, proper service standards for the restaurants, cleaning standards, bar and beverage operations, manager shift change checklist, catering operations, hiring checklist and training new employee’s checklist.

**Instructions on how to use these forms:** Download the pdf/word document and tweak/edit to the needs of your business and use it for training staff/managers. Checklist(s) helps with operations consistency and task accountability from all involved employees.

**Sources:**

1. Payne-Palacio, June. (2016). Foodservice management: principles and practices (13th ed.). Boston: Pearson.
2. Business Operations, National Restaurant Association: <https://restaurant.org/Manage-My-Restaurant/Business-Operations>
3. Gregoire, M (2017). Foodservice Organizations: A Managerial and Systems Approach (9th ed.). Boston: Pearson.

*This publication has been peer reviewed*

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| **PURCHASING/ORDERING** | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Before the purchasing process begins** |  |
| Supplier selection/search done independently and records maintained |  |  |
| Request for proposals are sent out |  |  |
| Product specification (new products) for the menu is finalized |  |  |
| Steady supply of the product is guaranteed by the supplier |  |  |
| Discounts from other vendors and bulk ordering processes considered |  |  |
| **The process** |  |
| Current inventory on-hand is verified |  |  |
| Par-stock levels verified |  |  |
| Order sheets with product number and item descriptions are noted |  |  |
| Minimum order and order frequency verified |  |  |
| Lead time for delivery considered |  |  |
| Substitutions allowed/considered |  |  |
| Purchase order created |  |  |
| Prices verified from previous orders |  |  |
| Received confirmation of order/adjustments |  |  |
| **After placing the order - getting ready for receiving** |  |
| Quality of customer service and ease of placing order noted |  |  |
| Shipping and transportation verified to avoid any delays |  |  |
| Substitutions or any issues with product availability noted |  |  |
| Receipt and inspection of purchases |  |  |
| Invoice approval and payment - Do the three documents match? |  |  |
| Record maintenance - purchase order saved |  |  |

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| **RECEIVING** | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for receiving** |  |
| Delivery time(s) verified |  |  |
| Purchase order printed/verified |  |  |
| Identify and train the receiving personnel – written instructions available |  |  |
| Quality expectations are clearly outlined |  |  |
| Substitutions notified to concerned units |  |  |
| Product specifications are communicated to the receiving individuals |  |  |
| **The process** |  |
| Space for receiving and preliminary storage identified |  |  |
| Receiving equipment such as carts/dollies available and clean |  |  |
| Products verified visually for quality and condition |  |  |
| Temperature of cold/frozen products verified with a proper receiving thermometer |  |  |
| Dates of short-life products verified  |  |  |
| Weight based products are re-weighed to match with the invoice |  |  |
| Purchase order and invoice match verified |  |  |
| Products cross-checked with invoices and marked in the invoice |  |  |
| Discounts verified per contract |  |  |
| Transportation, shipping and taxes are verified |  |  |
| Prices verified and cross-checked with previous orders |  |  |
| Issues communicated promptly to delivery personnel |  |  |
| **After receiving - getting ready for internal distribution and storing** |  |
| Shipment rejection recorded and communicated to vendor according to procedures |  |  |
| Pictures of poor quality/damaged products taken and sent electronically to vendor |  |  |
| Credits applied per agreed methods/procedures |  |  |
| Return product stored appropriately with signage advising staff not to use it, keep copies |  |  |
| Products shorted are notified to the concerned unit |  |  |
| Invoice initially approved and ready for payment |  |  |

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| **STORING** | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for storing** |  |
| Receiving equipment such as carts/dollies available to distribute/move products |   |  |
| Prices verified and cross-checked with previous orders before storing |   |  |
| Shorts/missing products status communicated to the concerned department |   |  |
| Space for receiving and preliminary storage identified |   |  |
| Products which were shorted is notified to the concerned department for reordering  |   |  |
| **The process** |  |
| Make sure first-in, first-out policy is followed – rotate properly |  |  |
| Meat in the bottom of the freezer and refrigerator |   |  |
| Store food at least six inches off the floor |   |  |
| The storage area is clean and organized |   |  |
| Check the temperature of storage units frequently - at least twice a day |   |  |
| All perishable food should display proper dates before storing the product |   |  |
| Never overload the refrigerator/freezer |   |  |
| Throw out foods which are visibly damaged and spoiled - if in doubt – throw it away |   |  |
| Maintain a proper system and train your staff to follow procedures to avoid food-borne illnesses |   |  |
| **After storing - getting ready for preparation** |  |

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| **FRONT OF THE HOUSE PREPARATION** | **Completed/** **Not Completed** | **If not, what still needs to be done?** |
| Getting ready for front of the house preparation |  |
| Greeter area |  |  |
| Restrooms area |  |  |
| Dining room area |  |  |
| Register area |  |  |
| The process |  |
| Sweep inside and outside the property |  |  |
| Ensure doors and windows are clean |  |  |
| Ensure menus are fully stocked and clean |  |  |
| Dust screen and décor |  |  |
| Ensure the restrooms are cleaned and paper towels, toilet paper, hand soap are stocked |  |  |
| Ensure all tables, chair, booths, booster seats, high chairs are wiped and sanitized |  |  |
| Ensure all the salt & pepper and sugar caddies are cleaned and stocked |  |  |
| Ensure all the condiments are stocked |  |  |
| Check the stocking in FOH, and ensure that employees are aware of the non-available items |  |  |
| After FOH preparation - getting ready for Back of the house preparation |  |

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| **BACK OF THE HOUSE PREPARATION**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for back of the house preparation** |  |
| Ensure all items are stocked |  |  |
| **The process** |  |
| Ensure all dishes, pots, pans and utensils are cleaned and stored properly |  |  |
| Ensure all freezer, refrigerator and dishwasher temperatures are checked and recorded |  |  |
| Ensure all sinks are cleaned and sanitized after use |  |  |
| Ensure all work counters and surfaces are cleaned and sanitized |  |  |
| Ensure oven and stove areas are cleaned |  |  |
| Ensure daily prep checklists are prepared and posted prior to each shift |  |  |
| Ensure frozen products are thawed properly in accordance with food safety procedures |  |  |
| **After BOH preparation - getting ready for service** |  |

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| **SERVICE STANDARDS**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for service standards** |  |
| Host/Hostess are available |  |  |
| Waiter/Waitress ready for service |  |  |
| Final walkthrough of the dining room |  |  |
| **The process** |  |
| Host/Hostess greets and welcomes guests as they arrive |  |  |
| Host/Hostess provides friendly and positive guest service |  |  |
| Host/Hostess gives accurate wait times |  |  |
| Ensure all the phone calls are answered promptly within \_\_ rings (Usually 3 – 4 rings) |  |  |
| Ensure guests are greeted at the door/table within 60 seconds |  |  |
| Waiter/Waitress provides menu features or specials and personal recommendations if needed |  |  |
| Ensure the table is properly set for correct number of guests |  |  |
| Ensure all drink orders arrive within ( ) minutes |  |  |
| Ensure all appetizer orders arrive within ( ) minutes |  |  |
| Ensure soup & salads are delivered within ( ) minutes |  |  |
| Ensure entrees arrive within ( ) minutes |  |  |
| Waiter/Waitress needs to provide allergy information |  |  |
| Waiter/Waitress needs to repeat the order |  |  |
| Waiter/Waitress is clearing guest plates/bowls/silverware within ( ) minutes after the guest is finished |  |  |
| Ensure table is reset within ( ) minutes |  |  |
| **After service standards - getting ready for cleaning standards** |  |

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| **CLEANING STANDARDS**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for cleaning standards** |  |  |
| Dish station checked |  |  |
| Prep and grill station checked |  |  |
| Food and fry station checked |  |  |
| Front of the house cleaning checked including doors and windows |  |  |
| **The process** |  |
| Take out the trash and recycling - clean around trash and recycling bins if necessary |  |  |
| Clean and sanitize prep station surfaces, register surfaces |  |  |
| Clean ovens, fryers - replace oil every \_\_ days |  |  |
| Clean hoods or schedule maintenance with cleaning company |  |  |
| Clean and organize the refrigerator and freezer |  |  |
| Sweep and mop the floor and under equipment everyday |  |  |
| Clean and scrape grill |  |  |
| Clean and sanitize all the tables after every use |  |  |
| Clean and sanitize all the high chairs and boosters after every use |  |  |
| Wipe down all the counters |  |  |
| Clean the seats and benches |  |  |
| Vacuum the carpets |  |  |
| Clean and sanitize restroom, disinfect the toilets, wipe down the sinks, take out feminine hygiene product bags – empty garbage cans periodically |  |  |
| Wipe down kitchen equipment |  |  |
| Wipe down the walls if there are splashes |  |  |
| Wash utensils, small wares, flatware, and glassware and air dry overnight |  |  |
| **After cleaning standards - getting ready for bar operations** |  |

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| **BAR OPERATIONS**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for bar operations** |  |
| Ice filled in appropriate bins |  |  |
| Fruit and garnishes prepared |  |  |
| Stocking up |  |  |
| Cleaning and set up |  |  |
| **The process** |  |
| Wipe out sinks, bin, wells that contained old ice – proper scoops available |  |  |
| Fully stock ice bins with fresh ice everyday |  |  |
| Cut all fresh fruit needed and display in clean containers |  |  |
| Make sure open containers are properly dated |  |  |
| Stock any other garnishes in clean containers |  |  |
| Deep clean any build-up in ice machine/soda machines |  |  |
| Stock shelves and fridges |  |  |
| Set up bars with bar mats, speed trays, straws, picks, stirs, bar tools |  |  |
| Wipe and sanitize the bar top and stools |  |  |
|  **After bar operations - getting ready for manager checklist/shift change** |  |
| Wipe down bottles that have been used with a clean, warm towel |  |  |
| Place remaining fresh fruit/juices/garnish into clean containers and label with today's date |  |  |
| Clean and sanitize the bar top and stools |  |  |
| Break down the service bar and run everything through the dishwasher |  |  |
| Ensure the amount in the cash registers matches orders for the night |  |  |

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| **MANAGER SHIFT CHANGE**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for shift change** |  |
| Assign side tasks to staff - as appropriate |  |  |
| Maintain job descriptions for each role |  |  |
| **The process** |  |
| Cut appropriate labor when business slows down |  |  |
| Check employees' side work tasks before they leave |  |  |
| Ensure stations are restocked |  |  |
| Collect all server check-out sheets, cash drawers and tip report |  |  |
| Check bus stations, server stations, and restrooms are cleaned and stocked |  |  |
| Check with kitchen manager or chef if they have any concerns or challenges |  |  |
| Review dinner reservations book with host or hostess |  |  |
| Check employees' appearance and uniform |  |  |
| Make sure all safety gears are available – gloves, hairnets and googles |  |  |
| **After shift change - getting ready for catering checklist** |  |
| Begin service for next shift |  |  |

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| **CATERING CHECKLIST**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for catering checklist** |  |
| Client meeting/ event location/ event details & theme/ catering budget including menu options with service style discussed |  |  |
| Number of guest confirmed (if approximate - set a date to confirm) |  |  |
| Various courses in the menu discussed |  |  |
| Order verified with the client along with timeline for confirmation |  |  |
| Event date/ time(s) verified |  |  |
| Contract signed with all necessary information and instructions along with security deposit for the event  |  |  |
| Research vendors for the purchasing |  |  |
| Finalize vendors and place orders |  |  |
| Purchase order printed/verified |  |  |
| Receiving/storage instructions communicated to staff |  |  |
| Alcohol service/ license/permits and insurance verified for the event |  |  |
| Special requests notified to food production team/ kids/allergies/special accommodation |  |  |
| Payment options verified |  |  |
| In case of on-site cooking: all raw ingredients, equipment and necessary supplies verified |  |  |
| Transportation to venue confirmed along with storage at the event |  |  |
| Table set-up/equipment’s arranged per contract – ready for service |  |  |
| Post event/catering review done with client and staff |  |  |
| Final invoice sent to client |  |  |
| Thank you notes sent |  |  |

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| **HIRING**  | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for new hire** |  |
| Application for employment completed |  |  |
| W-4 form completed |  |  |
| I-9 form verified and completed |  |  |
| Direct deposit form |  |  |
| Alcohol service policy |  |  |
| Uniform policy discussed |  |  |
| Food handler permit verified and photocopied |  |  |
| State and city alcohol permit verified |  |  |
| Ensure employee files are organized and secured |  |  |
| New hire restrictions and accommodations discussed |  |  |
| Cell phone and internet policy discussed |  |  |
| **Enrolled in training** |  |

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| **TRAINING NEW EMPLOYEES** | **Completed/****Not Completed** | **If not, what still needs to be done?** |
| **Getting ready for training** |  |
| List of guidelines and responsibilities discussed with new hire |  |  |
| Menu descriptions test discussed |  |  |
| **The process** |  |
| Register/point of sale system shown and explained |  |  |
| Control cash flow procedures explained |  |  |
| Understanding the menu |  |  |
| Food delivery procedures explained |  |  |
| Greeting guests discussed |  |  |
| Telephone procedures explained |  |  |
| Team work skills and policy discussed |  |  |
| Understanding the side works |  |  |
| **After training - getting ready for new hire** |  |
| Ensure diversity statement of the business is discussed with the new employee |  |  |
| Menu description test administered |  |  |