

# Restaurant Operations Editable Checklist

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/Foodservice 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.

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<b>PURCHASING/ORDERING</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Before the purchasing process begins</b>		
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		
<b>The process</b>		
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		
<b>After placing the order - getting ready for receiving</b>		
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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<b>RECEIVING</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for receiving</b>		
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		
<b>The process</b>		
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		
<b>After receiving - getting ready for internal distribution and storing</b>		
Shipment rejection recorded 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		

<b>STORING</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for storing</b>		
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 are notified to the concerned department for reordering		
<b>The process</b>		
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		
<b>After storing - getting ready for preparation</b>		

<b>FRONT OF THE HOUSE PREPARATION</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for front of the house preparation</b>		
Greeter area		
Restrooms area		
Dining room area		
Register area		
<b>The process</b>		
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, chairs, booths, booster seats, highchairs 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		
<b>After FOH preparation - getting ready for Back of the house preparation</b>		

<b>BACK OF THE HOUSE PREPARATION</b>	<b>Completed/Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for back of the house preparation</b>		
Ensure all items are stocked		
<b>The process</b>		
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		
<b>After BOH preparation - getting ready for service</b>		

<b>SERVICE STANDARDS</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for service standards</b>		
Host/Hostess are available		
Waiter/Waitress ready for service		
Final walkthrough of the dining room		
<b>The process</b>		
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		
Wait staff 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		
Wait staff need to provide allergy information		
Wait staff needs to repeat the order		
Wait staff is clearing guest plates/bowls/silverware within ( ) minutes after guest is finished		
Ensure table is reset within ( ) minutes		
<b>After service standards - getting ready for cleaning standards</b>		

<b>CLEANING STANDARDS</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for cleaning standards</b>		
Dish station checked		
Prep and grill station checked		
Food and fry station checked		
Front of the house cleaning checked including doors and windows		
<b>The process</b>		
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 highchairs 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		
<b>After cleaning standards - getting ready for bar operations</b>		

<b>BAR OPERATIONS</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for bar operations</b>		
Ice filled in appropriate bins		
Fruit and garnishes prepared		
Stocking up		
Cleaning and set up		
<b>The process</b>		
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		
<b>After bar operations - getting ready for manager checklist/shift change</b>		
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		

<b>MANAGER SHIFT CHANGE</b>	<b>Completed/Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for shift change</b>		
Assign side tasks to staff - as appropriate		
Maintain job descriptions for each role		
<b>The process</b>		
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		
<b>After shift change - getting ready for catering checklist</b>		
Begin service for next shift		

<b>CATERING CHECKLIST</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for catering checklist</b>		
Client meeting/ event location/ event details & theme/ catering budget including menu options with service style discussed		
Number of guests 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		

<b>HIRING</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for new hire</b>		
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		
<b>Enrolled in training</b>		

<b>TRAINING NEW EMPLOYEES</b>	<b>Completed/ Not Completed</b>	<b>If not, what still needs to be done?</b>
<b>Getting ready for training</b>		
List of guidelines and responsibilities discussed with new hire		
Menu descriptions test discussed		
<b>The process</b>		
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		
Teamwork skills and policy discussed		
Understanding the side works		
<b>After training - getting ready for new hire</b>		
Ensure diversity statement of the business is discussed with the new employee		
Menu description test administered		