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Abstract

In order to serve alcoholic beverages in a responsible manner, most managers turn to alcohol server training programs to provide effective standardized training for the alcohol server. Whether or not the programs are perceived by hospitality managers as effective has not been established. The author presents the results of a study of Oklahoma hospitality managers who perceive alcohol server training as becoming less effective.

Keywords

Alcohol, Servinc, Training, Dan Crafts, Management, Beverage

Managers' Perceptions of Alcohol Server Training Programs

by
Dan Crafts

In order to serve alcoholic beverages in a responsible manner, most managers turn to alcohol server training programs to provide effective standardized training for the alcohol server. Whether or not the programs are perceived by hospitality managers as effective has not been established. The author presents the results of a study of Oklahoma hospitality managers who perceive alcohol server training as becoming less effective.

Excessive alcohol consumption resulting in accidents is not a new phenomenon. J. Henderson of the Insurance Institute traced the recognition of drunk driving as a public menace back to 1904 when an editorial attributed 25 fatal accidents in automobile wagons to overconsumption of alcohol.¹ Alcohol-related problems have been reported by cities like Stillwater, Oklahoma, which recorded 1,800 arrests in 1989; 75 percent of those people were under the influence of alcohol at the time of their arrest.²

A survey of U.S. prison populations revealed that 43 percent of those surveyed reported they were drinking at the time of the commission of the crime for which they were incarcerated.³ The annual economic cost to the U.S. for alcohol abuse is estimated at \$218 billion.⁴ This national epidemic has resulted in 23,000 people killed and another 500,000 injured in alcohol-related automobile crashes each year. On the average, five people die and another 115 are seriously injured every two hours of each day of the year.⁵ According to one report, more than one-half of the drinking drivers on the road did their drinking in licensed establishments.⁶ As a result, attorneys have been able to establish expansive liability against the hospitality industry for serving patrons to a point of intoxication and beyond.⁷

The hospitality industry faces unsettled times while trying to find a way to reduce exposure to liability and respond to society's call for responsible service of alcoholic beverages. For example, state and federal governments have stepped up the labeling requirements on alcoholic beverages. Hochstern noted that California Proposition 65 requires warnings against drinking during pregnancy.⁸ *The Washington Post* reported that establishments in Washington, D.C. that sell alcoholic beverages are required to post black and yellow cardboard signs warning against drinking alcoholic beverages during pregnancy.⁹ In December 1988 the Surgeon General convened more

than a dozen federal agencies to sponsor the Surgeon General's Workshop on Drunk Driving. Recommendations that came from the workshop were to lower the legal blood alcohol content (BAC) limit for driving from its current 0.10 percent to at least 0.08, preferably to 0.05 percent.¹⁰ However, it should be noted that important factions of the hospitality industry were excluded from the Surgeon General's Workshop.

Dram Shop Legislation Dates to 1800s

Negligent service of alcoholic beverages exposes the serving establishment to dram shop litigation under laws established as early as 1849. However, dram shop legislation does not always tighten the law pertaining to the service of alcohol. For example, the 1978 California Civil Code states "the furnishing of alcoholic beverages is not the proximate cause of injuries resulting from intoxication, but rather the consumption of alcoholic beverages is the proximate cause of injuries inflicted upon another by an intoxicated person."¹¹

The Model Dram Shop Act of 1985 was developed by the Medical Research Institute of San Francisco and focused on establishing guidelines for current alcohol liability concepts. Colman stated two main goals of the Model Act were to refocus the purpose of the dram shop laws to prevention of injuries and to direct judges and juries to the defendant's business practices rather than just the intoxication issue.¹² The act sets out two concepts of liability, one for negligent service and one for reckless service of alcohol. For example, service of alcohol to a minor or intoxicated person is considered negligent when the person knows, or a reasonably prudent person in like circumstances adhering to responsible business practices would know, that the person being served is a minor or is intoxicated. Recklessness exists when defendants intentionally serve alcohol when they know, as reasonable persons in their position should know, that service of alcohol creates an unreasonable risk of physical harm to the drinker and others.¹³

One of the key provisions of the Model Act is the Responsible Business Practice Defense. Under the provision, the service of alcohol is neither negligent or reckless if the defendant adhered to reasonable business practices at the time of the service. Evidence of such service includes comprehensive training for all personnel and maintenance of an adequate level of trained employees and agents for the type and size of the business. Peters maintains that establishing policies on prudent alcohol service is a primary element of responsible business practices, with the emphasis being on prevention rather than intervention; this includes alcohol education to employees.¹⁴

The Model Responsible Server Training Act of 1988 established a curriculum guide for training, with three levels of training that included the off-sale server, the on-sale server, and managers and licensees. The emphasis is on the effects of alcohol on the body, the

effects of alcohol combined with other drugs, the recognition of dealing with underaged and intoxicated drinkers, and state laws relating to civil and criminal liability.¹⁵

Some States Require Training

Within the scope of existing alcohol server training programs, some states have mandatory training requirements, while other states have voluntary programs. For example, the states of Alaska, Illinois, Louisiana, Massachusetts, Nevada, Utah, and Wisconsin have mandated training programs. States such as Texas, Georgia, Iowa, Kansas, and Oklahoma have voluntary programs. Participating in voluntary server training programs in Texas can provide immunity from liability. In accordance with the guidelines of the Model Responsible Server Training Act of 1988, the content and delivery system for alcohol training should be determined by advisory committees such as the Utah Division of Substance Abuse of the Department of Social Services which regulates that state's mandatory training program. The training that is currently provided in most states is conducted by private groups, while the state-run programs are in the minority. Some of the major providers are Miller, Anheuser-Busch, Sheraton, and Holiday Inn.¹⁶

Since 1983 Peters has conducted seminars with an emphasis on server responsibility, and currently refers to his work as "Responsible Beverage Service." Beyond the "Responsible Beverage Service" program, Peters has played a key role in the development of the Responsible Beverage Service Council.

Training for Intervention Procedures for Servers of Alcohol (TIPS) was developed by Morris Chafetz, a psychiatrist, former head of the National Institute on Alcohol Abuse and Alcoholism, and founder of the for-profit corporation Health Communication, Inc. The TIPS training program, evaluated through studies by Geller and Russ, can have a positive impact on drinking behavior in an establishment serving alcohol.¹⁷ It emphasizes the trainer-training program more than the server-training.¹⁸ According to the TIPS training manual, the program is designed to increase the awareness of how the "people skills" of servers can be employed to influence patrons' drinking behavior.¹⁹

Techniques for Alcohol Management (TAM), a national server education program sponsored by the National Licensed Beverage Association, includes videotape training and discusses federal, state, and local laws, as well as clinical effects of alcohol on the body, techniques of alcohol management, customer disturbances, and dealing with false identification.²⁰ The TAM program can be adapted to fit the regulations and laws of different states such as the OKTAM server training program offered in Oklahoma.

Both TIPS and TAM, described as "conceptually good," are said to cover the material in a systematic way. While TIPS is said to be more interactive than TAM, its two-day instruction for trainers has been

criticized for providing little quality control. Although TIPS has been considered the model for all other programs, some experts say that its credibility is wearing down, and it has been criticized for lack of follow-up. TIPS has had its greatest success through Anheuser-Busch and Miller, which have used the program as a marketing tool for their products.²¹

Bartenders Against Drunk Driving (BADD), founded in 1982 by Carol Charette, was the first professional association for bartenders that focused on the responsible service of alcohol.²² The alcohol server training program utilized by BADD is Training in Management Effectiveness and Service (TIME) and is considered a program that provides defense mechanisms against exposure to alcohol liability lawsuits and increases customer satisfaction and employee morale.²³ The emphasis of the TIME program addresses point-of-sale prevention primarily through the bartender and servers.²⁴

Christy and Colman developed the alcohol server training program LAST CALL, Inc., Learning Alcohol Service Techniques for Control Against Liquor Liability. The program focuses on consulting directly with licensed businesses or parent corporations with a concern for point-of-sale prevention in impoverished rural areas and minority communities.²⁵ According to Christy, socio-economically depressed areas have generally not benefited from federal and state funded server training programs.²⁶ Christy also contends that this is ironic in light of the fact that the first server training program ever conducted in the U.S. took place in a black-owned bar and was attended only by black participants.²⁷

Beverage Service Symposium Held

On March 21, 1991, 82 state leaders participated in an historic event, the first California Symposium on Responsible Beverage Service. The purpose of the symposium was to offer participants the opportunity to consider community perceptions, research findings, and strategies for developing and implementing responsible beverage service training programs. Although server training programs will vary in their content and delivery systems, the symposium operated on the premise that responsible beverage service programs should include manager and server training, as well as public and consumer awareness and the development of prevention policies. The overall mission for the symposium was to hold a consensus building meeting that would result in recommendations on the direction and means for implementing responsible beverage service training throughout California for all licensed sellers and servers of alcoholic beverages. To accomplish the mission four general issues were addressed:

- the need to establish clear standards on responsible service training

- the need to formulate a systematic process for initiating, sustaining, and evaluating programs, instructors, and provider agencies or organizations
- the need to examine, define, develop, and promote economic incentives for responsible beverage service training
- the need to improve interagency communication at the state and local level²⁸

The participants reached a consensus on the need to create an advisory group to the Governor's Policy Council on Drug and Alcohol Abuse to establish standards for server training, certify and review programs, and develop incentives for voluntary participation. A majority opinion agreed that participation in server training should be voluntary, with provisions made for liquor law violators to be mitigated through participation in responsible beverage service training programs. A similar approach to this recommendation was taken in Ontario when Molson Breweries agreed to provide \$500,000 for the formation of an alcohol server education fund as a settlement in the matter of violations of the Ontario Liquor License Act.²⁹ Widespread support was received at the California symposium for the formation of broad-based community coalitions throughout California promoting responsible beverage service.³⁰

The involvement by a wide base of support to establish effective guidelines and evaluation methods has been ongoing since 1984. One thing that is clear throughout the process is that before considering the content of the server training program, it is important to examine other issues surrounding responsible beverage service.³¹

Survey Conducted in Oklahoma

In Oklahoma there is no legislative directive mandating participation in any particular alcohol server training activity. The selection and participation in such a program is voluntary and dependent on managers' perceptions of the overall effectiveness of the program. The Oklahoma Alcohol Beverage Law Enforcement (ABLE) Commission currently utilizes the OKTAM (Oklahoma Techniques for Alcohol Management developed from TAM) program for training and certification purposes. The majority of the participants in the OKTAM program are hourly employee servers; a minority are management personnel. As of October 1990, 770 participants had completed the OKTAM training since its implementation in Oklahoma. From October 1990 to October 1991, 2,148 participants completed the training.³²

In October 1991 a study was conducted to gather information about Oklahoma hospitality managers' perceptions of alcohol server training programs. A survey was sent to 376 randomly-selected participants from 1,130 members of the Oklahoma Restaurant and

Hotel/Motel Association; 87 questionnaires were completed, for a return rate of 23 percent. Respondents were owners and managers of clubs. Some did not respond to all questions and, in some instances, the respondents could respond to more than one variable in a question. The results of this study and the Crafts and Sanders study on Oklahoma managers' perceptions toward alcohol server training were analyzed using a Chi Square test of independence ($P = .05$).³³

Managers of restaurant operations comprised the largest number of respondents (61 percent), followed by managers of clubs/taverns (22 percent), and managers of hotels/motels with a club/lounge (17 percent). Most came from cities with a population of over 100,000 (47 percent). The largest style of ownership was sole proprietor (39 percent), followed by chain/corporate (34 percent), and partnership (22 percent). This agrees with Rinke's research that despite its collective vastness, the food service industry is comprised of 50 percent small sole proprietorships.³⁴

Of the type of customers who most frequented the hospitality operations, families (28 percent), and professionals (27 percent) ranked highest, followed by working class/blue collar (13 percent) and groups/catered events (12 percent); tourist/travelers numbered 10 percent); and singles, 8 percent. The number one response of "family" is in keeping with trends cited by Wilson which indicated that 97 percent of Americans surveyed indicated devoting time to family life is their highest priority.³⁵

Survey Results Vary Widely

Hospitality managers operate in a society that demands responsible service of alcoholic beverages and participation in alcohol server training. However, the findings of the study revealed that hospitality managers in Oklahoma perceive alcohol server training programs today to be significantly less effective than the training programs in 1989. Managers have shown a significant increase in the use of contracted agencies to conduct their training, suggesting an increased acceptance of programs developed by server training providers.

The findings of the study showed a significant increase in the use of alcohol servers to communicate alcohol service policies to the guest, a positive result and primary focus of both prevention and intervention training programs. Having policies and procedures on alcohol service and increasing the utilization of servers to communicate alcohol service policies is considered the foundation of responsible alcohol beverage service and the litmus test for the "responsible business practice" defense for the operation.

The study revealed significant differences in approaches taken by managers in dealing with first-time alcohol policy violations by a server. Oklahoma hospitality managers have significantly increased the rate at which employees are terminated for first time violation of alcohol server training programs. This finding supports the notion that managers are responding to society's call to serve alcohol in a

more responsible manner. The results further revealed managers are also receiving fewer training updates from trade associations. Managers who did receive training updates from associations showed a significant drop in the perceived value of the information. This reveals a need for associations to provide current alcohol server training material as a benefit of membership and routinely evaluate the training materials to ensure that current and useful information is provided to establishments serving alcoholic beverages.

The study further revealed that managers have significantly reduced the use of standardized procedures for identifying and dealing with intoxicated customers, placing the operation at risk of serving a guest to a point of intoxication and beyond. Standardized procedures could include training servers to count drinks or factor the customer's body size to establish a good base for predictability of the human body's physiological response to alcohol. However, it should be emphasized that body size alone is not panacea for predictability. The results of a lack of training on standard procedures could be damage and or harm to property and individuals by the intoxicated guest. This results in increased exposure to liability lawsuits against the operation and/or server.

Training Programs Must Be Continued

The results of the study indicate a need to continue the development and delivery of effective alcohol server training programs. Additional research is needed to assess the hourly employee perception of training received and its effectiveness in training the employee to deal with prevention and intervention issues in alcohol service.

The survey gathered additional data that revealed relatively even sales in the product mix with beer at 28 percent and wine, spirits, and cordials, 24 percent. The data also revealed that 74 percent of the establishments take advantage of the earliest possible opening time of 10 a.m. for the sale of alcohol in Oklahoma; 30 percent close at 2 a.m., the last hour of legal operation. In terms of number of hours of service managers reported being open to serve alcohol, most (44 percent) indicated 11 to 13 hours.

Price ranges charged for various alcoholic beverages revealed two thirds of the operations charged \$1.75 or more per glass for beer. Almost all (97 percent) charged \$3.50 or less for a glass of wine. Most managers (83 percent) reported the charge for spirits (80 proof alcohol or greater) at \$3 or less and 95 percent reported cordial charges at \$3.50 or less.

With regard to how often alcohol server training is conducted, 27 percent conduct no training, 31 percent conduct monthly training, and 20 percent train annually. Of those managers who train on a regular basis, 67 percent noted they do not certify the trainee through testing; 83 percent do not require certification for employment.

Nearly three-fourths of the operations do not have alcohol server policies, and nearly two-thirds rated the training as good. The number

of managers reporting that they did not use the Oklahoma Alcohol Beverage Law Enforcement Commission's OKTAM (Oklahoma Techniques for Alcohol Management) certification program was recorded at nearly 80 percent.

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Appendix A

Comparison of 1989 and 1991 Perceptions of Managers on Alcohol Server Training Programs

- **Recruit employees with a required number of years experience in serving alcoholic beverages:**

	n	1989 percent	n	1991 percent
No	249	68	54	69

- **Minimum number of years experience required:**

	n	1989 percent	n	1991 percent
Less than one year	47	41	9	31
One year	47	41	15	52
Two years	16	4	3	10
Three years	0	0	0	0
More than three years	5	1	2	3

- **Conduct regular alcohol server training meetings and training sessions:**

	n	1989 percent	n	1991 percent
No	226	62	52	72

- **Effectiveness of meetings and training sessions toward lessening the probability of liability lawsuits:**

	n	1989 percent	n	1991 percent
Effective	157	43	6	10
Somewhat effective	168	46	49	80
Ineffective	39	11	6	10

- **Alcohol beverage servers specifically trained concerning legal aspects of alcohol service:**

	n	1989 percent	n	1991 percent
Yes	326	90	78	90

- **Maintain employment records that detail alcohol server activity:**

	n	1989 percent	n	1991 percent
No	182	50	40	56

- **Method of training used:**

	n	1989 percent	n	1991 percent
In-house training	235	85	51	60
Contracted agency	24	9	24	28
Other	17	6	10	12

- **How servers are trained to communicate alcohol policies to customers:**

	n	1989 percent	n	1991 percent
Posters	189	52	5	6
Table Tent	88	24	7	8
Servers	47	13	61	69
Lapel buttons	34	9	4	5
Other	6	2	11	12

- **Penalties for first violation of an alcohol beverage service policy:**

	n	1989 percent	n	1991 percent
Reprimand	189	52	44	42
Termination	87	29	39	38
Suspension	48	13	19	18
Combination of above	34	9	2	2
None	6	2	0	0

- **Receive alcohol server training updates from national, state, or local associations:**

	n	1989 percent	n	1991 percent
No	157	43	81	68

- **Member of the association from which you receive updates:**

	n	1989 percent	n	1991 percent
No	87	42	80	71

- **Rated value of training updates received from an association:**

	n	1989 percent	n	1991 percent
Excellent	62	29	6	10
Good	110	53	36	59
Fair	29	14	13	21
Poor	6	3	6	10

- **Servers trained on standard procedures for identifying and dealing with intoxicated customers:**

	n	1989 percent	n	1991 percent
No	73	20	63	83

- **Servers trained to maintain records of cutting off alcoholic beverage service to intoxicated customers:**

	n	1989 percent	n	1991 percent
No	229	63	40	56

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