

PALM BEACH ESTATE ACADEMY



Curriculum

Certified Estate Management Program

Spring 2017

The Certified Estate Management Program

Program Curriculum

The PBEA Estate Management program is a 6 week, 270 Hour intensive training schedule that provides a solid foundation for students interested in pursuing a career in Estate, Property or House management in the private service industry.

It presents the technical skills, the management tools, personal development and broad range knowledge required to succeed in the Service Management Profession

After completing our training, students will leave with the following tools:

- ✓ Estate Management Certification
- ✓ Entertainment & Event Planning
- ✓ Luxury Service Etiquette and Protocols
- ✓ Fine Housekeeping techniques
- ✓ Security & Smart Home Technology
- ✓ Property & Grounds Maintenance
- ✓ Culinary for Private Service
- ✓ Private Service Sommelier Service

The program is designed by industry professionals and is constantly updated to reflect the ongoing developments in technology and Industry requirements.

Relationship of Service and Leadership

Being successful at a career is not only a matter of understanding the job, it is also about understanding of one self. Why do I want to work in the Service Industry, what are my Service Styles?

We cover:

- ✓ Overview and Defining the Relationship of Service
- ✓ Service Philosophy and Attitudes
- ✓ Self-Assessment in the Relationship of Service
- ✓ Individual Myers Briggs and FiroB Assessment
- ✓ Profiles and Conflict Resolution Styles are identified
- ✓ Choosing Service & Service Leadership vs. Management
- ✓ Service Styles and Cultures
- ✓ Developing your Employment Profile
- ✓ Family Tree Dynamics
- ✓ Service Code of Ethics
- ✓ Image and Personal Presentation
- ✓ Coaching for Private Service Interviewing
- ✓ Privacy and Professional Boundaries
- ✓ Roles and Perspectives
- ✓ Employability Critiques
- ✓ Personality Aspects of a Service Heart
- ✓ Understanding Life Balance

Management Techniques

As an Estate Manager your most important job is to identify service expectations and then customize a service delivery plan. We teach the process of identifying, organizing and prioritizing household staff duties and service expectations.

Areas of emphasis include:

- ✓ Introduction to Service Management and Management Tools
- ✓ Identifying Vision and Service Goals
- ✓ Employers Family Tree and Traditions
- ✓ Household Favorites and Preferences
- ✓ Family Schedules
- ✓ Establishing the Environment
- ✓ Physical Structure and Service Flow
- ✓ Housekeeping and Maintenance Task Sheets
- ✓ Employer's Service Standards & Matrix
- ✓ Provider's Technical Skills Qualifier and Matrix
- ✓ "Schedules & Position Descriptions

Service Standards in:

- ✓ Administration, Calendars, Inventory Housekeeping Schedules
- ✓ Culinary Expectations
- ✓ Clothing and Valet Care
- ✓ Entertainment – Event Planning
- ✓ Property and Grounds Management Maintenance Task Schedules
- ✓ Transportation and Travel Schedules
- ✓ Safety and Protection Management
- ✓ Personal Care: Elder, Guest, Child (Nanny), and Pet
- ✓ Special Events, Budgets/Expenses,
- ✓ Maintenance Projects, Inventory, art and Collectibles
- ✓ Overall Service Matrix

Service Standards and Technical Skills

Students are empowered with the skills needed to be leaders of people and managers of projects in Private Service. Accepted Human Resource Practices, Time Management, and the Supervision of Vendors in the Business of Private Service Management are taught. Students experience the different roles within the home environment and learn that it can be as challenging to Receive Service, as it is to Give.

- ✓ Introduction to Administrative Standards Time Management
- ✓ Managing Calendars, Cell Phones and other Electronic Devices
- ✓ Service Flow
- ✓ Hiring and Retaining Household Staff
- ✓ Background Investigations
- ✓ Desired Management Traits
- ✓ Managing and Resourcing Support Vendors
- ✓ Inventory, Art and Collectibles
- ✓ Introduction to the Family Office Household Finances,
- ✓ Records and Budgets (QuickBooks)
- ✓ Staff Clothing and Uniforms

Housekeeping and Valet Techniques & Standards:

- ✓ Housekeeping Standards and Philosophy
- ✓ Household Housekeeping Techniques and Tool Box
- ✓ Daily, Weekly and Detail Cleaning
- ✓ Detail Housekeeping & System Schedules Cleaning Products (Green)
- ✓ Chemicals, Tools, and Cleaning Closet Organization
- ✓ Care and Identification of Fine Bed Linens
- ✓ Bed Making and Turndown Service
- ✓ Care of Fine Art and Collectibles
- ✓ Conservation of Fine Art
- ✓ Oriental Rugs and Care
- ✓ Staff Training Inspections and Supervision

Service Standards and Technical Skills continued...

Clothing & Valet Standards:

- ✓ Closet Organization
- ✓ Sewing Skills, Emergency Repair
- ✓ Recognition of Designer Clothing
- ✓ Understanding of Dry Cleaning
- ✓ Valet, Folding, and Packing for Travel
- ✓ Ironing and Steaming Skills
- ✓ Laundry Skills
- ✓ Care of Fine Table Linens and Spot Removal
- ✓ Leather and Shoe Polishing

Basic Culinary Training for Private Service

As an Estate Manager you are typically not expected to be in charge of every day cooking at the household, but we provide you with the skills needed to prepare simple, tasty meals if needed. But, most of all, the ability to pair wine and food and prepare menu suggestions is a valuable skill

Culinary Standards:

- ✓ Food and Kitchen Safety
- ✓ Kitchen Organization, Equipment
- ✓ Nutrition, Healthy Cooking
- ✓ Food Purchasing, Fresh and Bulk
- ✓ Storage, Refrigeration
- ✓ Menu Planning
- ✓ Product Identification
- ✓ Health Food and Use of Fresh Ingredients Hors d'oeuvres
- ✓ The Marriage of Food and Wine
- ✓ Family Favorites, Menus and Comfort Food

Entertainment in Private Service

The Ballet of Service is an inspirational and educational experience where students become fully acquainted with Private Service Event Planning. The Formal Dinner is scheduled; Table Etiquette, Protocol, Formal and Informal Entertaining, Table Service, Table Settings are practiced with Floral Design along with Care of Fine Linens. Students also practice the Marriage of Food and Wine, Sommelier Service, Organoleptic Tasting, Wine Cellar Management, Classic Cocktails, and Cigars.

Event Planning and Ballet of Service:

- ✓ Setting-up for Entertaining (the Ballet of Service)
- ✓ Event Planning and Logistics
- ✓ The Formal Table
- ✓ Seating Charts
- ✓ Table Settings
- ✓ Table Service Styles
- ✓ Table Linens
- ✓ Caterers, and Rentals
- ✓ Identification and Care of China, Crystal, and Silver
- ✓ Flower Arrangements and Design

Etiquette and Principals of Service:

- ✓ Entertaining Etiquette
- ✓ Personal Service Graces and Formal Introductions
- ✓ Grooming, Speech, and Writing Personal Presentation
- ✓ The Luxury Market
- ✓ Fine Stationary

Entertainment in Private Service continued...

Sommelier Course:

- ✓ The History of Wine
- ✓ Components of Wine
- ✓ Wine and Beverage Service
- ✓ Wine Cellar Management
- ✓ The Pairing of Food and Wine
- ✓ Tasting Organoleptic (involving the use of sense organs)
- ✓ Old-World and New-World Winemaking Liquor and Bar Set-up
- ✓ Sommelier Service
- ✓ Liquor and Bar Set-up
- ✓ Coffee, Tea and Water Service
- ✓ Introduction to Cigars

Property and Grounds, Maintenance, Transportation & Travel and Security Standards

Master gardening and Smart Home Technology has become essential knowledge to the Private Service Profession. In the Estate Management Program the student will learn from landscape experts, technology gurus and security professionals the major points of knowledge required of a Household Professional

- ✓ Care of Grounds and Property
- ✓ Horticulture and Landscaping
- ✓ Basic Household Maintenance
- ✓ Intelligent Home Technology Home & Security Systems
- ✓ Luxury Car Care & Chauffeuring
- ✓ Concierge & Travel Services
- ✓ Fire Protection
- ✓ Advanced Care: CPR and First Aid

Personal Care Standards

Personal care is the center of the relationships you will create with your principals and their families and guests. You will learn about each of the personal care disciplines as they pertain to Children, Elders, Guests, and Pets; how to set up support staff and schedule daily care

Child Care Standards:

- ✓ Nanny Management System
- ✓ Terms and Definitions
- ✓ Nanny Management
- ✓ Politics and Etiquette of the Household
- ✓ Conflicts Between Nannies and Parents
- ✓ Schedules

Elder Care Management:

- ✓ Senior Service Management
- ✓ Aging of America
- ✓ Mental, Spiritual, and Physical support
- ✓ Social Support and Staying Active
- ✓ Management of Care Givers and Schedules

Guest Care Standards:

- ✓ Guest Care Management
- ✓ Concierge Services
- ✓ Guest Service Visions and Favorites
- ✓ Entertainment
- ✓ Service Standards and Tracking Favorites

Pet Care Standards:

- ✓ Pet Care Management
- ✓ Service Standards for Household Pets
- ✓ Suggested Schedules for Pets
- ✓ Bathing and Grooming

Setting up a Service Management System

This is the capstone of the Household Management Certification and it is where you actually create and customize a service management plan. The student will utilize all aspects of the service management system presented at the beginning of the course and demonstrate knowledge and ability in identifying specific service standards for Principals in all service categories and put the service plan into action. This is where you complete a Household Manager's book.

- ✓ Customizing a Service Management Plan and Creating a Household Manager's Book
- ✓ Identifying the Principal's Lifestyle Service Vision
- ✓ Identifying the Environment
- ✓ Identifying the Service Standards
- ✓ Working with the Service Management System's Tools
- ✓ Presenting it to Your Principals and Fine Tuning

The Schedule

The Estate Management Course runs 5 days a week, Monday through Friday for 6 full weeks. 270 hours of classroom and hands-on tuition will be done at the magnificent PBEA Estate in Palm Beach, Florida, for a hands on training that realistically mimics the real life working conditions the candidates will experience upon employment.

2017 classes will start in May