

United States Department of Agriculture

Food and Nutrition Service

1999

## **Team Nutrition Presents**

# A Guide for Purchasing Food Service Equipment





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# A Guide for Purchasing Food Service Equipment

In the continuing effort to provide technical assistance through the Team Nutrition Initiatve, the United States Department of Agriculture's Food and Nutrition Service, in cooperation with the National Food Service Management Institute (NFSMI), is pleased to bring you A Guide for Purchasing Food Service Equipment. This Guide was developed by NFSMI under a grant from USDA.

Team Nutrition is printing and distributing a copy, free of charge, to each School Food Authority nationwide. We hope that this publication will help you manage your food service operation most efficiently.

You can buy additional copies from the NFSMI by calling 1-800-321-3054. The item number is R35-98 and the cost is \$50. Please direct questions about distribution of the *Guide* to USDA Child Nutrition Division at 703-305-1624 and questions about the content to Dr. Martha Conklin, NFSMI, Division of Applied Research, 601-266-5773.

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## National Food Service Management Institute

## The University of Mississippi

#### Location

The National Food Service Management Institute (NFSMI) was established by Congress in 1989 at The University of Mississippi in Oxford. The Institute operates under a grant agreement with the United States Department of Agriculture, (USDA) Food and Nutrition Service. NFSMI's Applied Research Division is located at The University of Southern Mississippi in Hattiesburg.

#### Mission

The mission of the NFSMI is to provide information and services that promote the continuous improvement of Child Nutrition Programs.

#### Vision

The vision of the National Food Service Management Institute is to be a leader in providing education, research, and resources to promote excellence in Child Nutrition Programs.

### Programs and Services

- Quality publications appropriate for child nutrition personnel at an affordable price
- Applied research for development of effective child nutrition management practices
- Workshops and seminars for training child nutrition personnel
- National network of trainers
- Training materials developed by states for resale
- Education and training standards and materials
- Free training and information teleconferences through Nutrition Satellite Network
- Clearinghouse for information retrieval and dissemination
- Technical assistance through toll-free "help" lines

For more information, please call NFSMI at 1-800-321-3054,

NFSMI - Building the Future Through Child Nutrition

**PREFACE** 

Congratulations! You have the opportunity to actively participate in the process of purchasing new foodservice equipment. You have many decisions to make that will impact your final outcome.

Knowledge is power. The more information you have the more confident you are that the decisions you make will give you the outcome you want.

A Guide for Purchasing Foodservice Equipment is designed to help you purchase conventional foodservice production equipment using a decision-making process and critical pathway approach. This guide has a companion reference which is The New Design Handbook for School Food Service (1997). Whether you are purchasing new equipment for the first time or the fifteenth time you will find the guidelines beneficial. Think of purchasing equipment as a journey down the Purchasing Parkway. There are three different exits off the Purchasing Parkway:

- Highway of New Construction
- Renovation Road
- Replacement Drive

Each exit off the Purchasing Parkway has some unique turns, but each journey follows the same basic critical pathways.

Some journeys down the Highway of New Construction will require use of The New Design Handbook for School Food Service (1997) because both design and purchasing decisions are involved. A Guide for Purchasing Foodservice Equipment addresses the decision-making process for purchasing foodservice equipment.

The *Guide* is organized by chapters on each phase of the process. Traveler's Tips are scattered throughout the *Guide* to highlight key points, to give suggestions, or to alert you to essential information. You are encouraged to read the *Guide*, write in the margins, discuss content with professional colleagues, and utilize the self study components. In this way the *Guide* will help you work through the decision-making process for purchasing equipment necessary to transform the present foodservice system into an up-to-date, efficient operation.

A Guide for Purchasing Foodservice Equipment is the result of a multi-year project by the National Food Service Management Institute (NFSMI). This project created resources for Child Nutrition Program (CNP) directors, childcare providers, and other foodservice professionals to help guide the decision-making process for the purchase of foodservice equipment. A publication resulting from the project includes, *Guidelines for Equipment to Prepare Healthy Meals* (Nettles and Carr, 1996).

A Guide for Purchasing Foodservice Equipment is the next phase of the project continuum. Use it to make decisions today that will affect your customers and employees for many years to come.

A Guide for Purchasing Foodservice Equipment was developed with input from NFSMI Applied Research Division (ARD), industry advisors, CNP directors, peer review committee of outline, peer review committee of text, and USDA. Many thanks go to the foodservice professionals who gave their time and expertise to make this project a reality.



If you are involved in designing a new foodservice concept, you will need to purchase and use *The New Design Handbook for School Food Service*. It is available from NFSMI.

## Acknowledgements

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## **OVERVIEW**

The purchase of new foodservice equipment begins with a vision of the kitchen with the new equipment installed and operational. The purchasing process requires thought and planning to meet rapidly changing customer and community expectations. Chapter 1 focuses on the process of clarifying your guiding principles. The guiding principles are the cornerstone of the decision-making process and should reflect the philosophy and goals of the school and community. Keep in mind that although CNP directors and childcare providers will find numerous references to parents, community, and teachers, the *Guide* is designed to serve as a reference for all foodservice professionals.

A follow-up identifies how your customers see your operation and how you can continuously improve the system. This includes a thought-provoking exercise to help you focus your planning on incorporating the guiding principles into all the decisions you make as you select and purchase foodservice equipment. The planning process is critical since the decisions may impact taxpayer resources, the health of students, and the overall financial integrity of the program. All purchases of foodservice equipment should follow the same basic decision-making process even though the size or scope of the project may vary. Strategies are provided to assist you in developing and executing critical path planning.





## Beginning With the End in Mind

The CNP director's professional life is fast paced and often overwhelming. School districts are rapidly changing to meet customer and community expectations. How does the CNP director have time to tackle the purchase of new foodservice equipment, let alone have time for a thorough planning process?

Stephen Covey, author of *Seven Habits of Highly Successful People* (1989) recommends starting with the end in mind. "Beginning with the end in mind" (p. 99), is based on the principle that all things are created twice. "There's a mental or first creation, and physical or second creation to all things" (p. 99).

Take the construction of a new school for example. The planning team creates every detail to reflect the philosophy and goals of the school and community before ground is ever broken. Covey states, "the extent to which you begin with the end in mind often determines whether or not you are able to create a successful enterprise" (p. 99).

The *only* way to ensure that the foodservice equipment purchased will meet the future needs of the school foodservice program is to incorporate a well thought-out plan. This is a responsibility that every project team must take seriously since decisions impact taxpayer resources, the health of students, and the overall financial integrity of the program.

A Guide for Purchasing Foodservice Equipment was written to help you work through the process of selecting and purchasing new foodservice equipment. You will want to use it in conjunction with *The New Design Handbook for School Food Service* (1997) if your project includes layout and design. Think of A Guide for Purchasing Foodservice Equipment as your road map down the Purchasing Parkway. Exits off the Purchasing Parkway will lead you in specific directions. If you are building a new school, look for the Highway of New Construction. If you are replacing or adding selected pieces of equipment, look for Replacement Drive.



Regardless of your past professional experience or your fork in the Purchasing Parkway, your ultimate goal is to purchase foodservice equipment that:

- meets customer expectations
- incorporates flexibility
- addresses long-range needs of the school system
- facilitates regulatory compliance

## Developing A Mission Statement

Do you have a mission statement for your program? If you do, pull it out at this point. Your equipment purchasing decisions should reflect your program mission. If you do not, consider developing a mission statement.

How long does a good mission statement have to be? There is no right or wrong answer. The best approach is to think of it as an advertisement of beliefs and intents—nothing more, nothing less. The statement will serve as the catalyst for your success. As such, it is rarely more than a couple of pages in length. The bottom line is that the mission statements of your school district and your program are valuable documents. Once approved, the mission statement should be posted and discussed with school foodservice personnel. Remember that the mission statement is the premise for all decisions.

How is a mission statement developed? One effective way is to create and distribute a questionnaire that focuses on key criteria. In *Keeping the Best*, Martin Yale (1991) suggests that focusing on these criteria will form the foundation of the mission:

- What do we do for a living?
- When do we do it?
- Why do we do it?
- For whom do we do it?
- Why are we in this field?
- Where do we want to go?
- What do we want to achieve?



Once the initial criteria are addressed, ask these questions to help draw all foodservice professionals to the same point:

What business are we in, and why are we in it?

What business should we be in, and why?

What is unique about us?

What trends are changing school food service?

Does technological development in our industry threaten us or offer us new opportunities?

Who are our customers? Are they a growing or shrinking entity, and why?

?

What do our customers really want? How do we know this?

What are our competitors doing?

How does school food service improve the lives of our customers?

Will these same foodservice systems still achieve these benefits one year (two years, five years) from now?

How has our business changed in the last five years?

What are we doing to attract and retain staff to our program? What can we do better in employee relations?

What is our commitment to: students, employees, parents, administrators, staff, the board of education, suppliers, the local community, and society at large?



## **Getting Started**

The first thing to remember is that you are about to embark on a journey down the Purchasing Parkway. In *First Choice*, Marlene Gunn (1995) points out, "critical path planning allows the school purchaser to keep the process organized. Purchasing (equipment) is not part of the daily work schedule, so it is easy to forget a task at the appropriate time" (p. 48). She further points out that when planning critical paths, start with the date of first delivery and work backwards.

You will not reach your destination at the end of the Purchasing Parkway in a day or two. It will likely take you months or even years to complete the critical path planning process. The process will give you an opportunity to:

- assess the needs of the program
- read the *Guide* as needed and consider the options
- consult the experts, consultants, advisors, and peers
- consult your school food authority
- complete the self assessment including program profile (chapter 4)
- visit schools with a similar design or vision
- visit foodservice equipment testing labs or trade shows
- select the equipment
- issue or "let" the bid
- award the bid
- receive the equipment
- install the new equipment
- train your employees on the safe use and care of the equipment

If that sounds like a long trek ahead, with some potholes along the way, you are right. Rest assured, though, that the trip will be interesting and exciting.

A Guide for Purchasing Foodservice Equipment will help you look ahead for the potholes and guide you around them. It will bridge your knowledge with the advice of experts in the field. It will even serve as an industry standard for you to present your plan to the school system administration.



Have you noticed that everyone seems to have an opinion about how the new kitchen should be designed or about the selection of equipment to be purchased? Your experience is not unique. You can expect school administrators, teachers, school support staff, community representatives, and school board members to have an opinion about how the final kitchen should look. Keep in mind that their perspective and priorities may not be the same as yours.

As you prepare for the journey ahead, remember:

- You and your employees have the greatest insight into what has and has not worked in the past.
- You have an understanding of your customer expectations that most industry experts do not have.
- You bring to the planning team a level of expertise that no one else from the outside brings.
- You are responsible for following all state, local, and federal regulations.

In other words, a basic principle of continuous quality improvement (CQI) is that those individuals working with a task or function are best equipped to make recommendations about the improvement of the respective function. The same principle is true for this decision-making process. Have confidence in your expertise and utilize past experience in the decision-making process.

## At the Starting Line

## Step one:

Take a deep breath and relax for a few moments. Everyone gets a bit anxious before starting on a long journey. The Purchasing Parkway is no exception. Being anxious will only cloud your thinking.



A Guide for Purchasing Foodservice Equipment is designed to walk you through each phase of the equipment purchasing process. It will help you:

- look at the big picture
- listen to new ways of meeting customer expectations
- identify the wide variety of industry resources available
- identify funding sources for the project
- make wise use of taxpayers' money
- develop and execute critical path planning

2 3

## Step two:

Brainstorm to crystallize your vision of a completed process.

### Step three:

Define the guiding principles for purchasing foodservice equipment. Whether you are building a new kitchen, adding or replacing foodservice equipment, the guiding principles are the foundation for all decisions. They are:

- knowing and meeting customer expectations
- building in flexibility to meet future needs of the program
- building in flexibility to meet future needs of the school system
- making prudent use of taxpayers' money

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## Step four:

Start the process described in the *Guide!* Remember to keep your eyes on the guiding principles. Don't lose sight of them. Let the guiding principles be the basis for your project goals and final decisions. Don't forget that other participants in the process may have different guiding principles and goals than you. Don't assume that everyone understands or shares your guiding principles and goals. It is your job to do the process correctly and to persuade the school system administration to embrace your guiding principles.

This next step is important in the process of "beginning with the end in mind" (Covey, 1989). You operationalize your guiding principles by brainstorming your vision of your foodservice system. The *NFSMI High School and Middle School Student Satisfaction Surveys* (1997) are tools to help you crystalize your vision. The surveys are also tools to help the CNP director continuously improve the program as perceived by the customer.



# Your first guiding principle is knowing and meeting customer expectations.

How can I select the new equipment to best meet my customers' needs and expectations? Complete the following exercise.

Customers' Needs and Expectations Example:	Identify Equipment That Will Meet the Needs of My Customers Example:	
Wide variety of food choices	Multi-use equipment supports choice	
Flavorful food	Steamer will retain flavor	
Attractively merchandised food		
Value priced meals		
Ethnic and cultural preferences		
Meal time schedules		



The NFSMI High School and Middle School Student Satisfaction Surveys and survey guide will help you keep your focus on customer needs and expectations. Remember that the kitchen design or the selection of replacement equipment needs to be made with the customer in mind.





Your second guiding principle is building in flexibility to meet future needs of the program.

## Flexibility means:

- the ability to easily move certain pieces of foodservice equipment
- the ability to use one piece of equipment for more than one cooking method
- freedom to expand, reduce, or reorganize your foodservice system when the customers' needs and expectations change

Brainstorm your vision of flexibility by asking yourself these questions:

What is the most annoying aspect of equipment that is currently found in my school district? (Feel free to list more than one.)



If I had a magic wand, how would I make the kitchen(s) more efficient?

What kinds of equipment have I seen in professional journals or at professional meetings that would add flexibility and broaden the scope of my current operation?

Would any of these pieces of equipment make my operation more efficient? If yes, how?



Call professional organizations like the American School Food Service Association (ASFSA), The American Dietetic Association (ADA), and the North American Food Equipment Manufacturers (NAFEM) for help. A listing of resources is included in the appendix under Resources.





## Your third guiding principle is building in flexibility to meet future needs of the school system.

Most school districts have a long-range plan to build, reopen, or close schools. This plan changes as the general population in the district changes, but it will address the vision of the school board and administration. In addition, the superintendent's office may have historical and projected enrollment numbers to establish district growth trends.

Ask yourself these questions to brainstorm your vision of meeting long-range needs:

How has the general population in my school district changed in the last five years? Are these changes a trend that will continue?



Are the changes in the population specific to various age groups? (For example: more young families may have moved to the area due to increased job opportunities.)

Will the changes in the general population impact the school district in the next five years?

Do we expect more students or fewer students in the next five years?

Are these changes in numbers of students specific to grade levels? (For example: more elementary students but fewer high school students.)

Is my school district planning to build, reopen, or close schools in the next five years?

Is my school district planning to convert schools from one level to another in the next five years? (For example: convert an elementary school to a middle school.)



Ask the local Chamber of Commerce, Center for Economic Development, or your school district superintendent's office to help you answer these questions.





## Your fourth guiding principle is making prudent use of taxpayers' money.

"Public sector purchasing has the added dimension of accountability to taxpayers for how funds are used" (Gunn, 1995, p. 12). In other words, your purchasing decision will be evaluated in the community's eyes by how well you have used tax monies. Remember that selecting the least expensive equipment available may *not* meet your customer expectations, provide flexibility, or meet your future needs. The process outlined in this guide will provide you with a due diligence path to demonstrate accountability for taxpayers' resources.



Purchasing the least expensive piece of foodservice equipment with the fewest options may not meet program needs. In turn, this is not always the best use of taxpayers' money.

## Transforming the Mission and Vision Into Reality

Are you beginning to see how planning and guiding principles are important? Are you beginning to see the new kitchen in your mind's eye? Are you feeling more confident? Remember, knowledge is power. Hopefully you are making the transition from the excitement of the adventure into the serious planning of the journey. The most important thing to remember is your guiding principles:

- knowing and meeting customer expectations
- building in flexibility to meet future needs of the program
- building in flexibility to meet future needs of the school system
- making prudent use of taxpayers' money

Before you make any final decisions, be sure to ask yourself, "Is this decision consistent with the guiding principles?" If it is not, ask yourself, "How can I incorporate the guiding principles into my plan?"

Remember, if the guiding principles do not direct the decision-making process, the end product will not reflect your vision of success.



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