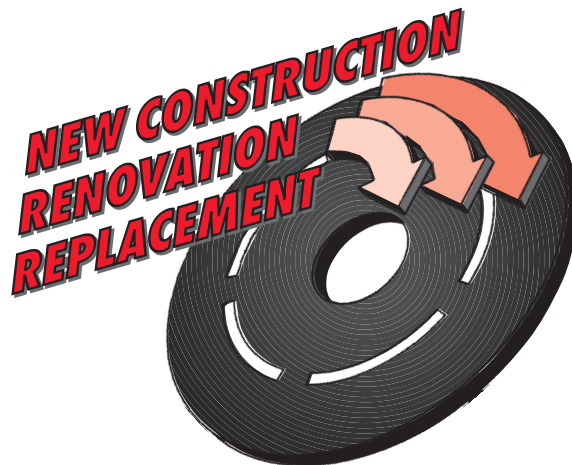


OVERVIEW

Having taken an in-depth look at the industry, project planning is the next phase of the purchasing process. This is the time to formulate decision-making pathways and to develop some preliminary details. Most project planning is directed by the CNP director in conjunction with a team of organizational representatives and industry advisors. The cornerstone of project planning is the program profile or data collection tool. The profile documentation and guiding principles will be the foundation for equipment purchasing decisions.

Chapter 4 provides a thorough program profile tool for the project team to complete. Remember the program profile is designed to support your planning process. This tool is designed to ensure your equipment purchasing decisions are analytically sound and in the best interest of the foodservice program.

In addition, Chapter 4 includes strategies for choosing team members for the project and tactics to build a bridge of understanding to other team members. The team will make decisions that will impact the CNP for years to come.



Preliminary Steps

The journey down the Purchasing Parkway is becoming a reality. Let's review where you have been:

- You have completed brainstorming and crystallizing your guiding principles.
- You have talked with industry advisors about your needs and expectations.
- You have looked at the big picture.

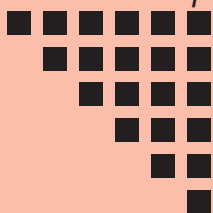
Now you will want to:

- Talk with colleagues and team members about your vision for success.
- Visit other schools to see desired equipment in action.

Now it is also time to put some facts on paper and really see how the journey is going to take shape. This is the time to formulate decision-making pathways based on your need to replace equipment, renovate a school(s) or undertake a new construction project. The experts call this phase *project planning*.

Project planning is the time to put all of your ideas on paper and begin to establish the planning strategy. If you are like most CNP directors, you are saying at this point, "I don't have time to get everything completed on my to-do list now. How do I have time to work on this plan?" The bottom line is, you cannot afford *not* to participate in this process. It all comes down to two important reasons. First, you want this purchase(s) to be right. It is a big responsibility that surely you take seriously. Secondly, you want your guiding principles to prevail over the numerous others who will be trying to influence the final decisions. Having your travel plans in order is the single best way to persuade others that the equipment type, specification, or even brand is best suited for your kitchen and program. The time investment will pay substantial dividends.

Traveler's Tip



When undertaking a renovation or replacement project require the dealer to visit the site in person in order to qualify as a responsive bidder. There are many details to consider: hood size, connections, utilities, etc.

Experts recommend using a team approach for collecting and analyzing the program profile. The profile documents information that will influence all equipment purchasing decisions and reflect all facility requirements. This is a critical planning step because:

- budgets are often based on the program profile
- operational functions are determined through the process
- it reflects your guiding principles
- it is a tool to inform school officials

A Guide for Purchasing Foodservice Equipment has designed the project planning section in a short answer format for easy reference and use. The scope of the project will determine the size of the team used to prepare the program profile. New construction projects will have the largest teams while equipment replacement projects will have the smallest.

ORGANIZING THE TEAM

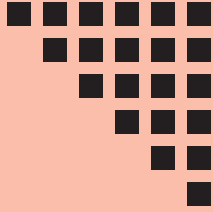
The first step in project planning is to pull together a team to compile and analyze the program profile. Give careful consideration to selecting each team member. Remember, the Purchasing Parkway is a long and sometimes winding road. Your team members will be your traveling companions for the weeks and months ahead. Look for the team members with these qualities:

- driver- someone who can take the lead even in stormy weather
- navigator- someone who can read the map and interpret the data including specification sheets
- problem-solver- someone who can redirect the team when a wrong turn is made
- visionary- someone who can see the “big picture” and help direct the team

Some individuals may serve more than one function on your team!



Traveler's Tip



According to *The New Design Handbook for School Food Service*, teams should “always include the people responsible for planning and building the facility, and the people who are responsible for its day-to-day operation.”

Most foodservice equipment purchasing teams will have designated members. Don't reinvent the wheel. Use professional networking and the expertise of your state agency personnel for advice and counsel. The scope of the project will determine the final composition of the team. Here are some individuals who may make up the teams:

Table 4.1 Project Teams

New Construction	Renovation	Replacement or Addition
CNP Director	CNP Director	CNP Director
Site Staff	Site Staff	Site Staff
District Superintendent/designee	District Superintendent/designee	District Superintendent/designee
School Administrator	School Administrator	School Administrator
Local Code and Regulatory Agencies	Local Code and Regulatory Agencies	Local Code and Regulatory Agencies
Health Department	Health Department	Health Department
School Board Member(s)	School Board Member(s)	
Architect with Engineering and Specialist Consultants	Architect with Engineering and Specialist Consultants	
Foodservice Consultant	Foodservice Consultant	Foodservice Consultant
Customers	Customers	
Parents	Parents	
Interior Designer	Interior Designer	

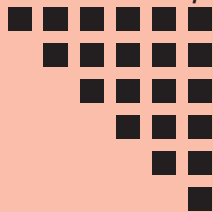


Start at the Beginning

Equipment purchasing teams will travel together in clear and cloudy weather. It is important that team members build strong bonds of respect for each other. Effective teams start with a vision of desired end results. This means commitment to the guiding principles, optimal performance, and good morale. Take time to thoroughly orient the entire team. Effective teams also achieve the desired end results through team member empowerment, strong team member relationships, effective team communications, and an ability to recognize and appreciate team member contributions.

As the CNP director, you have the clearest vision of the guiding principles directing the project. You can be sure that not everyone on the team will agree with your ideas on each section of the program profile. Be prepared to explain the end results of each decision. Be alert to whether a decision is consistent with the guiding principles. Remember, focusing on the guiding principles takes the personal opinions out of the discussion.

Traveler's Tip



You may want to standardize equipment purchased for the district. The benefits include: known expectations, standardized parts and service, implementation of preventive maintenance program, replacement with like items, and facilitation with employee cross training.

Strategies for Success

Team members can be troublesome companions as opinions differ and the wish list stretches beyond the capacity of the budget. Here are some strategies to help you build a bridge of understanding to other team members. At each team meeting:

- focus on common ground – everyone should be pleased to be in a new school, to have a new kitchen, or to have new foodservice equipment
- review the guiding principles directing the project
- take every opportunity to thank participants
- take all team communications professionally, not personally

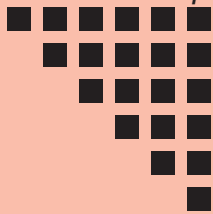


- face conflicts, resolve them, and then forget about them – stewing will only make matters worse
- take clear, concise minutes of all meetings to document team members' responsibilities and all decisions made

The following form, Program Profile, will help you gather information and organize the information so that the equipment purchase decisions are analytically sound and in the best interest of the foodservice programs. Section IX., p. 4.11 has been completed to provide an example. A master copy of the Program Profile can be found in the Appendix pages A.57-70.

The gathering of this information will help confirm the desired end result of the foodservice program provided by a particular facility. Whether you are planning for new construction, full or partial renovation, or adding and replacing equipment, you should complete this form. The results will be the development of an operational model of the foodservice facility.

Traveler's Tip



If your project is a new kitchen in an operating school, be sure your preliminary plan includes ways to serve meals during the construction process – especially if you are planning a “kitchen shutdown.”

I. RESPONSIBILITY FOR DESIGN, CONSTRUCTION, OPERATIONS			
Project Name	Phone	Fax	E-mail
Address			
School District			
Project Coordinators			
Address			
Address			
Architect			
Contact			
Address			
Food Service Consultant			
Address			
Program Dates:			
Design Completion:		Construction Start:	
Bidding:		Construction Completion:	
Foodservice Facility Budget: (attach)			
Approval procedure: (Note here the steps in the approval procedure, dates, contact names, and numbers)			



II. CUSTOMER POTENTIAL

Grade Levels _____ Student Ages _____

School Capacity _____ Projected Enrollment _____

Location of School: Rural _____ Urban _____ Suburban _____

Meal Service Offered: (Check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Breakfast | <input type="checkbox"/> Extended School Care |
| <input type="checkbox"/> Lunch | <input type="checkbox"/> Community Meal Service |
| <input type="checkbox"/> Snack Programs | <input type="checkbox"/> Senior Citizens Program |
| <input type="checkbox"/> Meals on Wheels | <input type="checkbox"/> Other _____ |

Anticipated Maximum	Daily Customer Count		
	Breakfast	Lunch	Other
Students			
Teachers/Staff			
Others			

III. MEAL SERVICE INFORMATION

Number of Breakfast Periods _____ Length of Session _____

Number of Lunch Periods _____ Length of Session _____

- | | | |
|------------------------|------------------------------|-----------------------------|
| Block Class Scheduling | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Continuous Service | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Open Campus | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Student Canteen | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Other | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Hours of Service: Breakfast _____
 Lunch _____
 Other _____

Maximum Seating at One Time _____



IV. TYPE OF KITCHEN			
<input type="checkbox"/> On-site production and serving <input type="checkbox"/> Finishing: finish production and serving <input type="checkbox"/> Central: production only <ul style="list-style-type: none"> <input type="checkbox"/> Full menu items <input type="checkbox"/> Specialized menu items (list) _____ <input type="checkbox"/> Bakery items <input type="checkbox"/> On-site production for outside serving and satellite locations			
		Number of meals served	
Satellite School/Location	Breakfast	Lunch	Other
<input type="checkbox"/> Satellite receiving and serving <ul style="list-style-type: none"> <input type="checkbox"/> Bulk hot <input type="checkbox"/> Bulk chilled for heating and serving <input type="checkbox"/> Pre-plated <ul style="list-style-type: none"> <input type="checkbox"/> Hot <input type="checkbox"/> Chilled for reheating and serving 			
V. TYPE OF PRODUCTION			
<input type="checkbox"/> Cook and serve <input type="checkbox"/> Chilled food system <ul style="list-style-type: none"> <input type="checkbox"/> Blast chill <input type="checkbox"/> Blast freeze <input type="checkbox"/> Water bath chill <input type="checkbox"/> Combination system <input type="checkbox"/> Rethermalization system <ul style="list-style-type: none"> <input type="checkbox"/> Conventional equipment <input type="checkbox"/> Specialized equipment <input type="checkbox"/> Other			



VI. MENUS

 Choice Limited choice

Self-service bars (like salad or taco) _____

Branded menus (list) _____
_____Menu specialization (list) _____

VII. TYPES OF FOOD SERVICE

Serving methods

- Traditional straight serving line
- Scatter or scramble
- Self-service, specialty bars
- Food court
- Kiosks and/or multiple decentralized areas
- Mobile units/carts
- Marché concepts
- Window-style service
- Vending machines in foodservice area
- Other (specify) _____



VIII. DINING AREA		
<input type="checkbox"/> Inside facility	<input type="checkbox"/> Outside facility	<input type="checkbox"/> Both
Seating capacity		
Common area	_____	
Dining room	_____	
Facility/Staff dining room	_____	

IX. INFORMATION FOR STORAGE

Decisions on the following will influence type of storage and equipment required.

Begin with 100% of each product category and break down the percentage as it applies.

Meat/Meat Alternate Items - indicate % of use			
List	Fresh	Frozen to cooler	Frozen to cook
Chicken products	0%	100%	0%
Fish products	0%	0%	100%
Ground beef	10%	90%	0%
Ground pork	0%	80%	20%
Ground turkey	0%	90%	10%
Hamburgers	0%	0%	100%
Turkeys	0%	100%	0%
Pizza	40%	0%	60%
Sandwich meats	0%	100%	0%
Convenience items	0%	30%	70%
Other			



IX. INFORMATION FOR STORAGE (cont.)				
Vegetable Items - indicate % of use				
List	Fresh	Frozen	Dehydrated	Canned
Green vegetables				
Onions				
Potatoes				
Root vegetables				
Other				
Fruit Items - indicate % of use				
List	Fresh	Frozen	Dried	Canned
Oranges				
Apples				
Bananas				
Juices				
Bakery Items - indicate products to be used and method of preparation				
List	Basic (raw) ingredients	Mixes	Frozen	Ready-to-serve
Bread (sliced, loaf)				
Rolls				
Muffins, biscuits				
Pastry, cookies				
Buns				
Other				



IX. INFORMATION FOR STORAGE (cont.)					
Liquid/partial liquid items – indicate % of use					
List	Raw to ready	Bases	Canned	Frozen	Chilled bags
Chili					
Sauces					
Soups					
Stews					
Other					



X. STORAGE INFORMATION	
<p>Length of storage periods is directly related to the purchasing procedures of food and supply products. The agreed upon delivery schedules from the food and supply product vendors may determine the length of storage periods. The length of storage may also be a result of available space coordinated with the product vendors.</p>	
Type of Storage	Length of Storage Periods
Refrigerated	Maximum Period
Meat and Poultry (34° F)	days
Fruit and Vegetables (38° F)	days
Dairy (34° F)	days
Freezer (0° F)	days
<p>Dry Storage Requirements:</p> <p>Check all disposables to be put in dry storage area:</p> <p><input type="checkbox"/> Straws <input type="checkbox"/> Napkins <input type="checkbox"/> Hot cups <input type="checkbox"/> Cold cups <input type="checkbox"/> Bowls <input type="checkbox"/> Eating utensils</p> <p><input type="checkbox"/> Plates <input type="checkbox"/> Trays <input type="checkbox"/> Pan liners <input type="checkbox"/> Sandwich wrap/bags</p> <p><input type="checkbox"/> Aluminum foil pans <input type="checkbox"/> Other _____</p>	
Type of Storage	Length of Storage Periods
Dry Storage	Maximum Period
Staples 60° F	days
Paper goods - routinely used products	days
Emergency disposables	days
Cleaning supplies	days
Other foodservice items	days



X. STORAGE INFORMATION (cont.)		
Special Requirements for Storage		
Type of Refrigeration Equipment		
Refrigerator:		
Reach-in	single, double	Walk-in
Reach-through	single, double	Walk-through
Freezer:		
Reach-in		Walk-in
Ice cream cabinet		Milk shake machine
Ice machine		Soft-serve machine

XI. SERVING AREA CONSIDERATIONS	
Will cashier computer terminals be used?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Computers linked to a network?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Location of server:	_____
Methods of payment:	<input type="checkbox"/> Cash <input type="checkbox"/> Tickets <input type="checkbox"/> Computer cards <input type="checkbox"/> Other
Will special merchandising be required in serving area?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Menu boards <input type="checkbox"/> Signage <input type="checkbox"/> Other	_____
Type of condiments provided:	_____
Location of condiments:	<input type="checkbox"/> Serving counters <input type="checkbox"/> Condiment counters
<input type="checkbox"/> Serving area <input type="checkbox"/> Dining room <input type="checkbox"/> Other	_____
How will condiments be dispensed?	
<input type="checkbox"/> Pumps <input type="checkbox"/> Portion packs <input type="checkbox"/> Other	_____
Beverages to be offered and how dispensed:	_____
Extra purchase items to be offered and how dispensed:	_____

Tableware:	
<input type="checkbox"/> Compartment trays, size _____	<input type="checkbox"/> Flat trays, size _____
<input type="checkbox"/> Dishes, permanent ware	<input type="checkbox"/> Dishes, disposable
<input type="checkbox"/> Eating utensils, permanent ware	<input type="checkbox"/> Eating utensils, disposable



XII. DISH/TRAY WASHING			
Will students self-serve trays/dishes/flatware?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes:		<input type="checkbox"/> Full self-scrapping	<input type="checkbox"/> Partial self-scrapping
Sanitizing System:			
Trays/Dishes/Flatware:	<input type="checkbox"/> Chemicals	<input type="checkbox"/> 180° F + hot water	
Pots/Pans:	<input type="checkbox"/> Chemicals	<input type="checkbox"/> 180° F + hot water	
Kitchen cleaning equipment:	<input type="checkbox"/> Hand	<input type="checkbox"/> Steam	<input type="checkbox"/> Hydro
Kitchen cleaning equipment located:	<input type="checkbox"/> Foodservice area		<input type="checkbox"/> Elsewhere
XIII. WASTE DISPOSAL			
What size trash receptacles? _____		How many? _____	
Preferred location for can wash and storage? _____			
Waste disposal systems to be used:	<input type="checkbox"/> Garbage disposal	<input type="checkbox"/> Compactor	
	<input type="checkbox"/> Pulper	<input type="checkbox"/> Cans/dumpster	
Frequency of trash pick-up? _____			
Is trash storage space needed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Recycling provisions: _____			
XIV. EMPLOYEE FACILITIES			
Employee toilets and lockers:			
<input type="checkbox"/> Hand washing facilities/lavatories			
<input type="checkbox"/> Men's and women's facilities	<input type="checkbox"/> Number of lockers each _____		
<input type="checkbox"/> Unisex facility	<input type="checkbox"/> Number of lockers _____		
Number of offices required? _____		Person(s) per office? _____	
Office furniture and equipment requirements: _____			

Educational facilities: _____			
Will a clothes washer and dryer be needed?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Will a time clock be required?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		Location: _____	

XV. TECHNICAL INFORMATION

Available utilities:

- | | |
|--------------------------------------|--------------------------------|
| <input type="checkbox"/> Gas | <input type="checkbox"/> Water |
| <input type="checkbox"/> Propane | <input type="checkbox"/> Sewer |
| <input type="checkbox"/> Natural | |
| <input type="checkbox"/> Electricity | |
| <input type="checkbox"/> Steam | |

Power specifications:

Electricity - voltage/phase

- | | |
|------------------------------------|------------------------------------|
| <input type="checkbox"/> 110-120/1 | <input type="checkbox"/> 208/3 |
| <input type="checkbox"/> 208/1 | <input type="checkbox"/> 220-240/3 |
| <input type="checkbox"/> 220-240/1 | <input type="checkbox"/> 440-480/3 |

Steam: psi _____ flow _____



XVI. EQUIPMENT SELECTION MATRIX

Using your menu as the guide, select and check equipment to prepare menu items. Many menu items may be prepared by using several different types of cooking equipment. Select equipment based on the best quality cooking results, utility energy efficiency, and human energy efficiency. When completed, analyze the total number of checks per type of equipment item. The results should justify and direct the equipment selection.

This chart is not meant to be inclusive. Use the blank columns as necessary. Examples are provided.

Menu Items	Tilting Braising Pan	Griddle	Char-broiler	Steam-jacketed Kettle	Pressure-less Steamers	Pressure Steamer	Fryer	Convection Oven	Combination Oven-Steamer	Conveyor Oven	Range-top	



XVI. EQUIPMENT SELECTION MATRIX (cont.)												
Menu Items	Tilting Braising Pan	Griddle	Char-broiler	Steam-jacketed Kettle	Pressure-less Steamers	Pressure Steamer	Fryer	Convection Oven	Combination Oven-Steamer	Conveyor Oven	Range-top	



XVII. OTHER CONSIDERATIONS

Will any existing equipment be used? Yes No

If so, local department of health may require:

- present location of item
- name of manufacturer
- model number
- all dimensions of item (length, width, height)
- utility requirements for connection
- school install or contractor installation
- any special requirements not listed above

Students with special needs that require unique preparation or serving equipment

Special requests for overall design

Facility designed for expanded capacity

Should facility be designed for future capacity

Description of innovations or experimental ideas which might be incorporated into the program

Method of procurement of equipment

Desired finishes for equipment and spaces

Equipment needed for each function

Reality Check Point

Hill County School District is experiencing rapid population growth after years of declining growth. The school board has developed the following three-year capitalized improvement plan:

Capitalized Improvement Plan	Time Table to Completion	CNP Director Concerns
Reopen Taylor Elementary Reopen Moore Elementary	12 mos. 18 mos.	Both schools have been closed for 12 years. Both schools have large inefficient kitchens. School board hopes to use existing equipment rather than buy all new equipment. Unemployment is very low in Hill County.
Enlarge Lockwood Elementary (double enrollment)	30 mos.	Production and storage areas are too small for projected capacity. Students have been surveyed and results suggest students expect higher quality foods.

The CNP director recognizes that the budgets will be limited and does not want to use any of the outdated equipment if possible. First the director/team must learn all they can about student population growth, school construction plan, the surplus equipment inventory, and possible alternate sources of funding. Next they talk with industry advisors, county inspectors and the general contractor about the renovation. They ask them to visit each site with them. Using their advice and all of the information they have gathered, they develop a program profile and select the equipment needed based on the menu and the constraints of each site.

The goal is to standardize three CNP operations. The director/team develop a plan for the flow of food and equipment that is similar in each school. They select the same basic production equipment for each school to streamline employee training and maintenance. The director/team has looked at the big picture for the school system and follows goals that are best for the local school district.

The CNP director has used the guiding principles and program profile information to direct the decisions. The equipment purchased is based on customer needs and expectations. They are planning for future growth by the decision to replace a worn out oven with one similar to the ones used in the current construction projects. They are making prudent use of taxpayers' monies by thoroughly planning out and analyzing all the facts about the program and then standardizing the operation.



References for Chapter 4

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