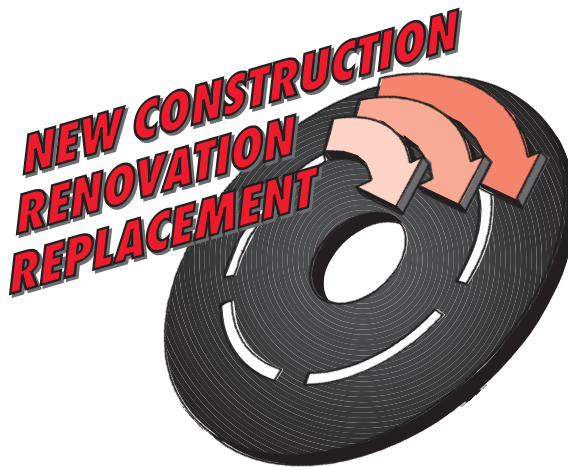


### OVERVIEW

Receiving initiates the beginning of the end or the completion phase of the procurement process. This is when the accuracy and completeness of your specifications will be ascertained. Chapter 9 provides you with a series of checklists to assist you in implementing your receiving plan. In addition, a competency assessment tool is provided to evaluate operator competence using the new equipment.



## The Journey's End

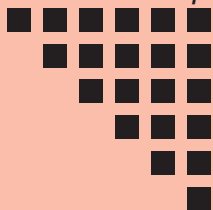
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Beginning the receiving process means you are nearing the end of your journey. This is the completion of the procurement process and the last major step before your new kitchen or new pieces of equipment are ready to use. During the receiving process, which is a quality assurance step, you will determine the accuracy and completeness of your specifications. The success of the receiving process is determined by the information provided in the specifications and bid document. If you missed an important detail in the specification process, it will not suddenly correct itself at delivery.

Since the success of the receiving process is determined by the specification and bid document, you should have designated the following instructions:

- where the equipment is to be shipped
- who is to deliver the equipment
- who will unload the equipment
- who will uncrate the equipment
- who will set the piece(s) in place
- who will make the final utility connections
- who will do the start-up
- who will provide the use and care demonstration

### *Traveler's Tip*



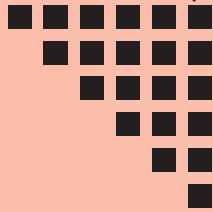
Remember that the receiving process can be smooth sailing or treacherous traveling. Even with the best plans, things can and will go wrong. Be sure you have a plan for unexpected delays.

*Be prepared to follow up on your previous investigation:*

- Is there a receiving dock?
- Does the delivery truck need a gate lift?
- Are dollies or hand trucks required?
- What is the size and weight of the crate?
- What is the measurement of doorways - height and width?
- Will the new equipment fit through the doorway?
- What is the width of the aisle space in the kitchen?
- Will tables and other pieces of equipment need to be moved temporarily?

- Has a utility requirement been provided?
- Have exhaust requirements been met?
- Does water need to be filtered?
- Are all permits secured?
- Has the installer been notified?

### *Traveler's Tip*



*Utility requirements include:*

*Electrical* - voltage, cycle, phase, amp, load

*Gas* - type, BTU, pressure, flow

*Water* - pressure requirements

*Steam* - flow, pressure

*Drains* - size, location

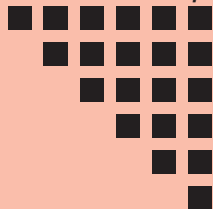
## Receiving Plan

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### Step 1 Preparing the Site for Installation

Site preparation is a critical step in determining your satisfaction with new foodservice equipment. Making simple mistakes or overlooking details can impact the efficiency and usability of your equipment. Pay close attention to the details of installation to achieve maximum usability of the equipment you selected.

### *Traveler's Tip*



Ensure that security is available on site. Don't fall victim to stolen or damaged items. Have small pieces of equipment delivered last in new construction.



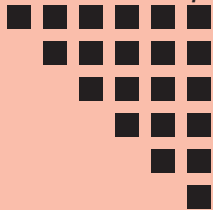
## Step 2 Receiving from the Shipping Company

Receiving the new equipment from the shipping company may feel like a “traveler’s rest” on this long journey. There are, however, set procedures that must be followed regardless of who initially received the equipment from the manufacturer. The foodservice equipment dealer, the school district warehouse personnel, and school personnel must understand and follow the set procedures in order to avoid problems documenting damage, shortage, or warranty claims.

In most cases, foodservice equipment is shipped *FOB Destination, Freight Prepaid*. This means the manufacturer handles claims for damage or shortage. However, any damage or shortage must be noted on the freight bill to initiate the process and to expedite the claim. On occasion, damage occurs during shipping and handling.

When equipment is received, it must be inspected for damage or shortage. First, inspect the crate for obvious damage. Even if the crate appears in excellent condition, the equipment may still be damaged. Next, thoroughly inspect the equipment to determine if there is any concealed damage. Remember, there are time limitations for filing freight claims. Any discrepancies - damage or shortage - should be noted on the freight bill *before* the carrier leaves.

### *Traveler’s Tip*



Be prepared for unexpected damage or shortage related to your new equipment. Have a plan in place to repair or return any damaged equipment. Also, have a source for replacement parts or total replacement of the equipment.



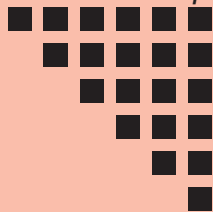
### Reality Check Point

Midwest School District purchased a convection oven from a local dealer. In the bid document, the dealer was responsible for receiving, delivering, uncrating, setting in place, and preparing for connection by others. It was a busy day at the dealer's loading-receiving area. The new convection oven was received without inspecting its condition. The dealer was actually waiting for other equipment to be received for the same school, which was expected in another month. The convection oven was delivered to the school and the process was begun to uncrate and set in place. At that time, the CNP director made a startling discovery. The manufacturer had sent the wrong oven and it had to be returned. The reorder would take several weeks to deliver so an alternate production plan had to be devised because school was opening. This major delay could have been avoided by the dealers' inspection of the equipment.

### Step 3 Uncrating the Equipment

The process is actually more challenging than it sounds. Keep the crates in useable condition and don't throw them out immediately. You will need the crates to return any equipment sent in error. Keep in mind that damaged equipment or equipment sent in error must be returned.

#### Traveler's Tip



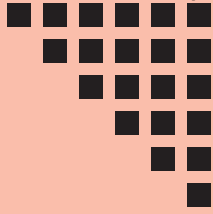
What do you do if the warehouse personnel throw away the crate and you need to return the equipment to the manufacturer? You will have to request a new crate from the manufacturer. This process wastes valuable time and delays resolution of your equipment dilemma. Be sure the warehouse personnel keep the crates in useable condition until you authorize them to discard them.

Once the equipment is carefully uncrated, check the manufacturer's data plate to be sure this is the piece of equipment on the bid document. If the data plate does not *exactly* match the specifications, it will probably need to be returned to the manufacturer. The data plate will indicate the following information:

- manufacturer
- model number
- electrical specifications (voltage, cycle, phase)
- gas specifications (BTU, gas type)
- steam specifications



### Traveler's Tip



Where is the data plate located on the equipment? Almost *anywhere!* There is no set place for the data plate. It may be on the back, front, or side of the equipment. It may be inside the door facing. Each manufacturer puts the data plate in a different spot. Also, the location varies with each piece of equipment. You may need to look!

What do you do if the data plate does not *exactly* match the specification? Contact the equipment dealer or manufacturer's representative. Do not proceed any further with your receiving process. You have not received what you ordered. This means a detour in your journey.

#### Step 4 Installation

Site preparation must be completed prior to the installation of the equipment. Ideally this process will be completed and all regulatory inspections passed prior to the receipt of the equipment. Site preparation will vary according to the types of equipment. For example, walk-ins have to be erected and hoods hung while other pieces of equipment are simply set in place. To ensure that you can install the equipment right away, verify the status of the site preparation schedule to avoid unexpected delays. Each piece of equipment has unique requirements for clearances and utility connections.

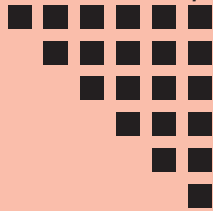
It is usually prudent to clarify the distance between the equipment and the utility connections. It is recommended that installers visit the site before the actual installation to determine wiring, piping, and conduit materials required for the job.

Now that the site is prepared as specified, installation can be scheduled. Proper installation is essential for equipment to operate effectively and efficiently. Over 80% of early warranty claims to manufacturers are the direct result of poor installation and environmental problems. This is why the manufacturer provides detailed installation procedures and requirements for site preparation. However, if the installers interpret the instructions incorrectly or simply ignore them, the equipment will not perform as expected.



Certain types of equipment have specific instructions regarding clearances. The clearances are determined for operating and maintenance purposes and should be followed. For example, most steam equipment requires open-gap drain connections. Manufacturers recommend placement and length of drain pipes to drains. If these instructions are followed, expect the equipment to function properly.

### *Traveler's Tip*



Problems resulting from improper installation are *not* a valid warranty claim. A bad installation can destroy a piece of foodservice equipment in minutes.

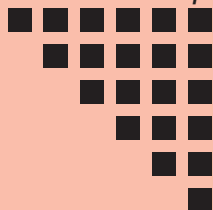
## Step 5 Start-Up

Once all aspects of installation have been completed according to the manufacturer's instructions and the proper power has been connected, the start-up can be arranged. Start-up may be the responsibility of the installer. Many manufacturers provide start-up service by the authorized service agency.

The start-up includes:

- on-site inspection to verify the equipment was installed according to manufacturer's instructions
- on-site inspection to verify the equipment is operating properly
- re-calibration (if needed) as it may have slipped during shipping and handling (not a warranty item)

### *Traveler's Tip*



The CNP director or designee needs to tag equipment to its specific location and log in model, serial number, etc. The CNP director should retain shop drawings on special order items.



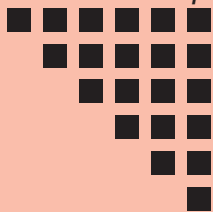
After the start-up has been completed, return all warranty cards to the manufacturer. Also secure permits (if required) and arrange for final inspections by local regulatory agencies.

### Step 6 Use and Care Demonstrations

The final phase of the receiving process is to arrange for a use and care demonstration from the manufacturer's representative. The demonstration should include:

- how to operate the equipment safely
- introduction of use and care manuals
- correct instructions on daily care and preventative maintenance
- helpful tips on the use and care of the equipment that are not in the manual
- hands-on operation for each participant

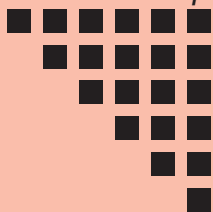
#### *Traveler's Tip*



Be sure the person doing the use and care demonstration is a qualified trainer representing the manufacturer.

Do not request this demonstration until the equipment has been certified for proper connection and start-up is complete. At that time, it is essential that all CNP staff and substitutes as well as all district maintenance staff attend the demonstration. Consider video taping the demonstration for use in follow-up training and for training new employees.

#### *Traveler's Tip*

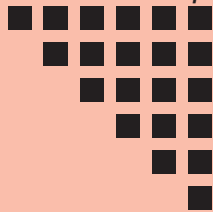


The installation job is not complete until the production staff cooks the first meal with the new piece of equipment!



Some manufacturers may provide use and care videos for additional staff training. It is recommended that hands-on operation, including the preparation of several menu items, be used. Follow videos during this practice to enhance operator confidence and to ensure operator competence. Each operator needs to demonstrate competence in the proper use and care of the equipment to the unit manager. Competency assessment is essential to verify that the employee can operate the equipment properly. All operators need to sign the use and care manuals or equivalent document to verify their attendance at the demonstration. This is an effort to document all in attendance for liability purposes.

### *Traveler's Tip*



Request multiple copies of the use and care manuals in your bid document. One set is for the school foodservice manager, one set is for the maintenance department, and the other copies need to be filed for future construction or renovation projects.



## Competency Assessment Checklist

Equipment \_\_\_\_\_ Employee \_\_\_\_\_

Competency	Date of Initial Training	Date of Competency Verification	Date of Annual Competency Verification
Employee demonstrates the correct use of equipment according to the manufacturer's use and care manual.			
Employee demonstrates correct safety procedures in the use of equipment.			
Employee demonstrates the proper techniques for cleaning and sanitizing equipment as described in the use and care manual.			
Employee demonstrates proper preventative maintenance recommended for optimal care of the equipment.			

Comments:

Evaluator: \_\_\_\_\_

Date: \_\_\_\_\_



## References for Chapter 9

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