

Lesson 3: Planning Process

Objectives

At the completion of this lesson, students will be able to:

1. List the six guiding principles for planning a centralized foodservice system.
2. Describe the roles of the school foodservice director and planning committee in planning a centralized foodservice system.
3. List key individuals who should be involved in the planning committee.
4. Identify and use sources of information on planning a centralized foodservice system.
5. Describe the role of the menu in the planning process.
6. Describe some of the recipe modifications that would be required when converting from a conventional to a centralized foodservice system.
7. Describe requirements for a new facility.
8. Develop an outline for a plan to be submitted for a facility review.

Student Reading Assignment

A Guide to Centralized Foodservice Systems, Chapter 3

Presentation Outline

Estimated time: This classroom presentation will require about 50 minutes. Depending on the use of learning activities, two or three class sessions would be required.

- I. Guiding principles for planning a centralized foodservice system

- II. Factors to consider in planning
 - A. Support for proposed system
 - B. Feasibility
 - C. District/environment
 - D. Labor considerations
 - E. Operations
- III. Foodservice directors' role in planning
- IV. Use of a planning committee
- V. Sources of information
- VI. Role of menu in planning process
- VII. Recipe modifications
- VIII. Planning equipment and facility
- IX. Facility plan review
 - A. Application
 - B. Proposed menu
 - C. Site plan
 - D. Building plan
 - E. Equipment schedule
 - F. Compliance review list

Suggested Learning Activities

1. Obtain a menu from a school district that has a conventional foodservice system. Have students review the menu and indicate items for which recipe modifications would be needed if changing to a centralized foodservice system. (Estimated time: 30 minutes)
2. Obtain a menu from a centralized foodservice system (or use the menu items listed in the case studies for Jefferson County School and Community Nutrition Services [p. 148], Minneapolis Public Schools Food Service [p. 161], or Saint Paul Public Schools Food Service [p. 179]). Have students discuss menu modifications that would need to have been made for centralized food production. (Estimated time: 30 minutes)
3. Give students copies of USDA quantity recipes for common items used on school menus (such as macaroni and cheese, spaghetti sauce, taco mix, sloppy Joe mix, pizza, etc.). Have students analyze the recipes and suggest changes that might be needed if the recipe were to be re-standardized for use in centralized food production. Have students discuss the recipes with the class. (Estimated time: 30 minutes)
4. Conduct a telephone or an e-mail interview with a school foodservice director who recently changed to a centralized foodservice system. Ask questions

about her/his role in the planning process, who served on the planning committee, the role of the planning committee, and preparation of documents for the facility plan review. Share results with the class. (Estimated time: 1 hour)

5. Contact the health department in your state to obtain information about facility plan reviews. Compare your state's requirements with the Food and Drug Administration's *Plan Review Guide* (2000). The outline for the *Plan Review Guide* is on p. 44 and the entire document can be downloaded from <http://vm.cfsan.fda.gov/~dms/prev.toc.html>. Have students discuss in class. (Estimated time: 1 hour outside of class; 1 hour in class)

Examination Questions

Short Answer

1. List the six guiding principles for planning a centralized foodservice system.

A. _____

B. _____

C. _____

D. _____

E. _____

F. _____

2. List six ways that the menu impacts the planning and operation of a foodservice system.

A. _____

B. _____

C. _____

D. _____

E. _____

F. _____

Discussion

1. You are the foodservice director in a district that is growing rapidly. It has been determined that a central kitchen will be built to meet the foodservice demands of the district. You will assemble a planning committee to help with the planning process.
 - A. Who (by position) would you want to invite to serve on the planning committee?
 - B. What functions would you want the planning committee to serve?
 - C. What is your role in the planning process?
2. What are good sources of information that would assist a foodservice director in planning a centralized foodservice operation?
3. Describe how the menu impacts the planning process for a centralized foodservice system.
4. For one menu item in each category, describe modifications that may need to be made for those menu items to be successful for centralized food production:
 - A. Taco filling or spaghetti sauce
 - B. French bread
 - C. Macaroni and cheese
5. You are planning a new centralized foodservice system for your school district. Describe the basic requirements for the new facility that must be described in a plan review application.
6. Develop an outline for the plan that must be submitted for review.

Answers to Examination Questions

Short Answer

1. List the six guiding principles for planning a centralized foodservice system.
 - A. A vision for the foodservice system is required at the beginning of the process for planning the system.**
 - B. The system must be customer-focused.**
 - C. Efficiencies are built on the system.**
 - D. Plan for the future.**
 - E. Centralized foodservice systems will impact the school district, not just the foodservice area.**
 - F. Quality and consistency do occur if appropriate standards, policies, and procedures are in place.**

2. List six ways that the menu impacts the planning and operation of a foodservice system. **Six of the following:**
 - A. Purchasing**
 - B. Storage type/space**
 - C. Production facilities**
 - D. Production equipment**
 - E. Staffing**
 - F. Service style/equipment**
 - G. Cost**

Discussion

1. You are the foodservice director in a district that is growing rapidly. It has been determined that a central kitchen will be built to meet the foodservice demands of the district. You will assemble a planning committee to help with the planning process.

- A. Who (by position) would you want to invite to serve on the planning committee?

Engineer, consultant, architect, general contractor, key staff members, superintendent or school business manager, representative of school district or city facilities department, bargaining unit representative, representative of the State Department of Health, Representative of the State Department of Education Child Nutrition Division, Representative of State Department of Agriculture

B. What functions would you want the planning committee to serve?

Provide technical expertise, provide different perspectives, advocate for the project with others

C. What is your role in the planning process?

Visionary, educator, marketer/communicator, liaison to stakeholders, decision maker

2. What are good sources of information that would assist a foodservice director in planning a centralized foodservice operation?

Answer should include some of the following: foodservice directors who have centralized foodservice systems, vendors, school district facilities staff, consultants, architects, personal experience, books, manuals, magazines, Internet, and health department.

3. For one menu item in each category, describe modifications that may need to be made for those menu items to be successful for centralized food production:

A. Taco filling or spaghetti sauce

Courser ground beef, smaller quantities of spices

B. French bread

Harder wheat flour, different proofing and baking times

C. Macaroni and cheese

Hard wheat macaroni, undercook macaroni to allow for reheating

4. Describe how the menu impacts the planning process for a centralized foodservice system.

Describe factors related to purchasing, storage type/space, production facilities, production equipment, staffing, service style/equipment, and cost.

5. You are planning a new centralized foodservice system for your school district. Describe the basic requirements for the new facility that must be described in a plan review application.

Discuss hand washing sinks; food preparation sinks; dishwashing; mop sinks; cold holding; rapid cooling; hot holding; rapid heating; equipment; indirect waste; hoods; wall, floor, and ceiling construction; lighting; doors and windows; storage devices; locker, dressing rooms, break areas; garbage areas; toxic items; and self-serve.

6. Develop an outline for the plan that must be submitted for review.

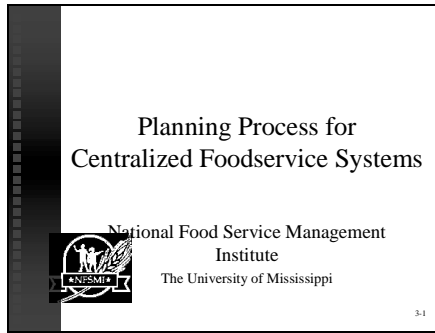
Proposed menus; site plan including location in building and location of building on site; facility plans including equipment placement, plumbing, electrical, mechanical; and equipment schedule.

Examination Items by Objective

- Objective 1 Short answer question 1
- Objective 2 Discussion question 1b and 1c
- Objective 3 Discussion question 1a
- Objective 4 Discussion question 2
- Objective 5 Short answer question 2 and discussion question 3
- Objective 6 Discussion question 4
- Objective 7 Discussion question 5
- Objective 8 Discussion question 6

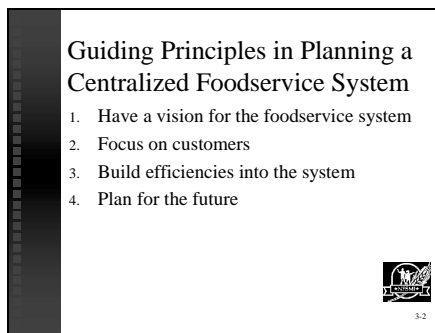
Lesson 3 Slide Notes

Slide 1



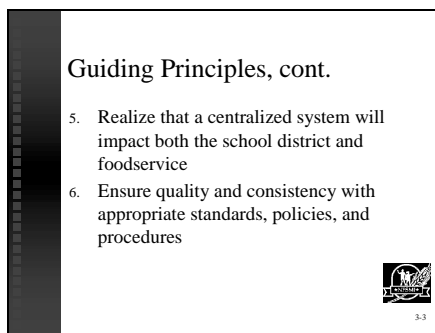
Note: These slides were developed to accompany Chapter 3, Planning Process for Centralized Foodservice Systems.

Slide 2



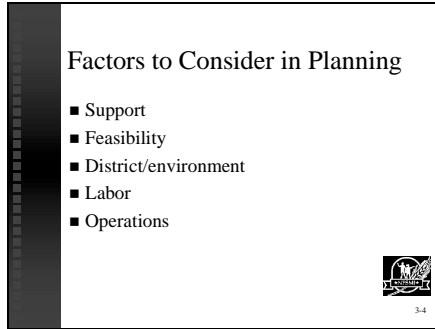
Six guiding principles for planning a centralized foodservice system have been identified. Discuss the importance of each principle to effective planning. Refer to pp. 35-37.

Slide 3




Continued from slide 2.

Slide 4



Factors to Consider in Planning

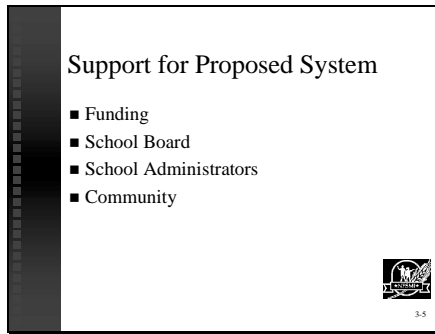
- Support
- Feasibility
- District/environment
- Labor
- Operations


3-4

There are many factors that must be considered when planning a centralized foodservice system. Each of these factors will be discussed in subsequent slides.


Refer to pp. 37-38.

Slide 5



Support for Proposed System

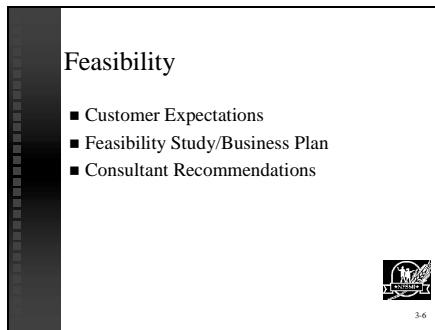
- Funding
- School Board
- School Administrators
- Community


3-5

Support for the proposed system relates to both financial support and support of key constituencies. Funding issues must be examined, for example, whether there is need for a bond issue to implement a new system. School board members, school administrators, and the community are key constituencies that are needed to make a centralized foodservice operation successful.


Refer to p. 37.

Slide 6



Feasibility

- Customer Expectations
- Feasibility Study/Business Plan
- Consultant Recommendations



3-6

Basic to the feasibility of any project is customer expectations, and expected customer satisfaction with the results of the project. A feasibility study (more information is included in Lesson 4; Chapter 4) provides a comprehensive examination of the current and proposed systems. A business plan, including pro forma income statements, provide information for planning. The consultant who conducts the feasibility study will make recommendations, which should be based on the data collected in the feasibility study process that will be used in the planning process. Refer to p. 37.

Slide 7

District/Environment

- Location/land availability
- Size of district
- Growing or declining in numbers
- Geography of the district—distance, traffic, accessibility



3-7

There are many factors related to the district and the local environment that impact the planning process. The proposed location of the central kitchen (or regional kitchens) and land availability will impact planning. A central location that is easily accessible and near major streets/highways is important. The size of the district and the growth or decline in numbers influence planning decisions. For districts expected to grow rapidly, consideration would be given to growth possibilities of the central facility. The geography of the district—size and distance between schools, traffic, and accessibility influence planning decisions. Refer to pp. 37-38.

Slide 8

District/Environment, cont.

- Future trends
- Central kitchen impact
- Political environment




3-8

Other district/environment factors include future trends that are anticipated. The central kitchen may impact the district in other ways—perceptions of customers and opportunities for increasing the number and types of customers. There may be political issues that would need to be considered in planning, such as zoning issues or incorporating a central kitchen into a central services facility requiring space sharing. Refer to pp. 37-38.

Slide 9

Labor Considerations

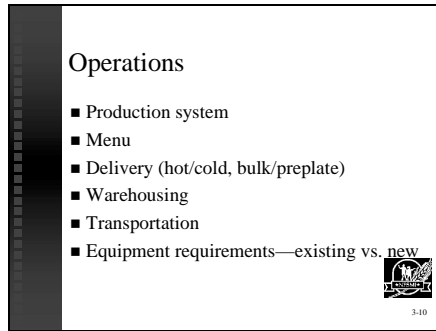
- Labor supply
- Labor union
- Impact on labor
- Job security concerns
- Training
- Health and safety
- Specialized skills available



3-9


Labor considerations are important in the planning process, just as they likely played a significant role in the decision-making process. Issues such as labor supply, unions, impact on labor, and job security concerns of current employees must be considered. Training will be critical for the success of the new system, and should be considered throughout the planning process. Health and safety issues will change when food production is centralized. Effective planning can reduce or eliminate many of the problem areas. Refer to p. 38.

Slide 10




Operations

- Production system
- Menu
- Delivery (hot/cold, bulk/preplate)
- Warehousing
- Transportation
- Equipment requirements—existing vs. new

 3-10


In the planning process, the production system will drive decisions. The menu should be planned early in the process because it is central to planning every aspect of a foodservice operation. The method of delivery, how and where warehousing will be done, transportation, and equipment requirements will need to be planned. Refer to p. 38.

Slide 11



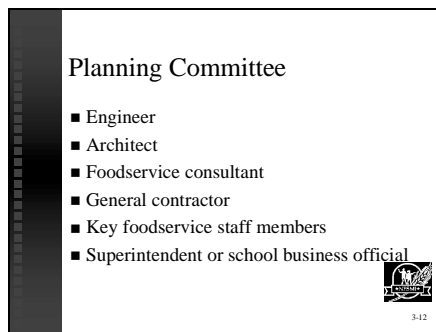
Foodservice Directors Role in Planning

- Visionary
- Educator
- Marketer/communicator
- Liaison to stakeholders
- Decision maker

 3-11


The district foodservice director most likely will play a major role in the planning process, and will serve in many roles in the process. Much time and energy will be devoted to the planning process. Refer to pp. 38-39.

Slide 12



Planning Committee

- Engineer
- Architect
- Foodservice consultant
- General contractor
- Key foodservice staff members
- Superintendent or school business official


 3-12

A planning committee will be critical to the success of the new centralized foodservice system. Committee members are selected to provide different perspectives and expertise. While getting such a large committee to function well, it will be well worth it in the end.

Slide 13

Planning Committee, cont.

- District facilities department representative
- Bargaining unit representative
- State department of health representative
- State Child Nutrition Program representative




3-13

Continued from slide 12.

Slide 14

Sources of Information

- Directors of centralized foodservice systems
- Vendors
- School district facilities staff
- Consultants
- Architects
- Personal experience




3-14

The district foodservice director and the planning committee likely will need to learn a lot about centralized foodservice systems in order to complete their tasks. For most committee members, it will be a first (and perhaps only!) time to be involved in planning a centralized foodservice system. Discuss the various sources of information that are available. Refer to p. 40.

Slide 15

Sources of Information, cont.

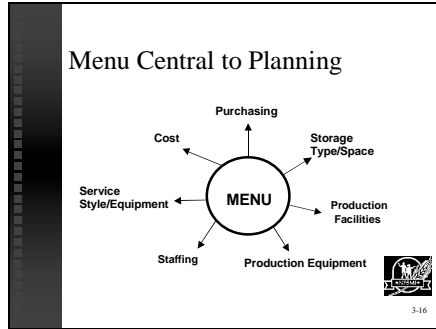
- Written resources
 - ◆ Books
 - ◆ Manuals
 - ◆ Trade magazines
 - ◆ Internet
 - ◆ Research articles
- Health department



3-15

Continued from slide 14.

Slide 16



As mentioned earlier, the menu is central to the planning process. Once the menu is planned, planning for facilities, equipment, staffing, service, cost, purchasing, storage, and production can be completed. Refer to pp. 41-43.

Slide 17

- Recipe Modifications
- Purchase different products
 - ◆ Courser ground beef
 - ◆ Higher gluten flour for baking
 - Adjust ingredient amounts
 - ◆ Vinegar
 - ◆ Spices
- 3-17

Many recipe modifications will be required when increasing the quantity of food produced and changing the equipment and processes for food preparation. These examples of required recipe modifications came from foodservice directors who have changed from conventional to centralized foodservice systems. Refer to p. 43.

Slide 18


- Recipe Modifications, cont.
- Modify ingredients
 - ◆ Modified starches as thickening agents
 - Modify techniques
 - ◆ Undercook pasta for reheating
 - ◆ Cooking times differ
- 3-18

Continued from slide 17.

Slide 19

Planning Equipment and Facility

- Efficient work flow
- Food safety
- Ergonomic factors
- Americans with Disabilities Act




3-19

When planning the facility and equipment, careful attention needs to be given to the work and food flow through the operation. Food safety (and HACCP implementation) needs to be considered when planning menus, food flow, equipment, and facility. Ergonomic factors must be considered in planning because there are more ramifications in a centralized foodservice system. Refer to pp. 44-45.

Slide 20

Facility Plan Review

- Application Documents
 - ◆ Application
 - ◆ Proposed menu
 - ◆ Site plan
 - ◆ Building plans
 - ◆ Equipment schedule




3-20

The Food and Drug Administration (FDA) and most state departments of health have guidelines for planning a new facility. The FDA document provides much technical information that will be helpful for individuals involved in planning. This outline presents the components that must be included in the application document that will be submitted to the appropriate local, municipal, or state agency. Refer to pp. 44-52.

Slide 21

Building Plan

- Equipment placement
- Plumbing
- Electrical
- Mechanical



3-21

The building plans would include equipment placement, and diagrams of plumbing, electrical, and mechanical systems. Refer to pp. 44-52.

Slide 22

Compliance Review List

- Food preparation
- Utensil and equipment storage
- Kitchen equipment
- Finish schedule
- Plumbing
- Physical facilities



3-22


The regulatory authority compliance review list is a checklist for reviewing the acceptability of many aspects of the plans.

Refer to pp. 44-52.

Slide 23

Compliance Review List, cont.

- Refuse and pest control
- Ventilation
- Employee restrooms
- Patron restrooms



3-23

Continued from slide 22.