

FEBRUARY 2013

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Menu Cost
More Than Meets the Eye

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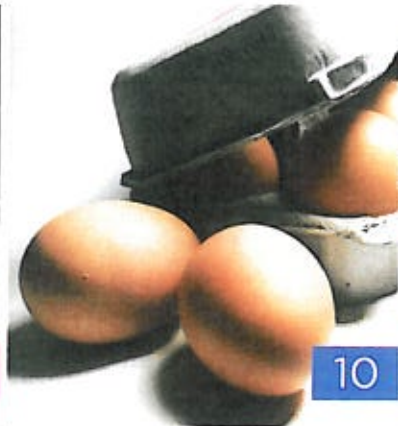
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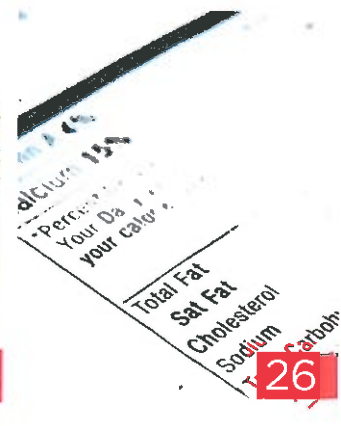
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Menu Cost

More Than Meets the Eye

by | Wayne Toczek

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The belt in healthcare is tightening. As operators, we are being told to do more with less, yet still be innovative and implement current trends. Taking a closer look at your menu will help you explore costs. What is your actual cost per meal? How does that compare to the cost quoted by your food vendor? Is the menu you implemented really at your budgeted cost? How was it calculated?

MANY FACTORS AFFECT FOOD COSTS— use of a purchasing group, geographic conditions, brands and types of food, quantity served, and much more. Using the formula of actual purchases divided by census gives an operator a good idea of the cost of food. However, to get a more accurate figure, you can categorize costs and adjust for inventory change, staff meals, department requisitions, supplements, and other factors. This gives you a snapshot of your overall operational expenses.

The best method to calculate costs is:

$$\frac{(\text{Inventory} + \text{Purchases}) - (\text{Inventory} + \text{Issues/Transfers})}{\text{Census}} = \text{Cost per patient or resident day OR}$$
$$\frac{(\text{Inventory} + \text{Purchases}) - (\text{Inventory} + \text{Issues/Transfers})}{\text{Meals Served}} = \text{Cost per meal}$$

PRESSURE TO CUT COSTS

Perhaps in the past your vendor presented you with a menu, in front of your boss, and the vendor said with great enthusiasm, "This menu has a cost of '\$\$' and it will save you money!" Your boss probably turned to you and said, "Make it happen." Suddenly, your budget is adjusted and the belt has tightened before you can utter a word.

So let's look at what made it appear you would save money using the vendor's or consultant's presented menu, and address the factors that were most likely not considered by your vendor, your boss, and even you.

Make taking inventory meaningful and worth your time. Since dairy, produce, and bread are used within a week of purchase, consider not inventorying them. Similarly, you will generally have the same amount of open spices, oils, film, etc. in your kitchen so don't inventory those either. A bit more complicated is whether or not to inventory items that are in process for tomorrow's menu, i.e., roast beef for lunch tomorrow. Most important, be consistent, and taking inventory will be a meaningful tool to use in managing your food costs.

change impact the cost to produce the item? Determine whether the way you currently prepare the item is the best method for your community.

REAL-WORLD VARIABLES

Perfect math is presenting food cost without considering variables like those presented in the example below. It assumes that the exact recipe will be followed and you'll use the entire product purchased for that recipe. In other words, the usage is end to end. Your odds for having that actually happen are slim. As an example, let's take the beef purchased for the meal. Will all the beef be used from end to end for the recipe? Similarly, not every biscuit made will be used. Was a garnish factored in? Other factors include human error, equipment error, and product substitution.

Example: Your beef stew recipe calls for 18# of beef cubes. You purchase beef cubes 10#/case with 2 5# units in each case. What will your cook do? a) use 20# of beef cubes, or b) remove the additional 2# for another use and actually use them. Option A will likely be the choice in most cases, resulting in an 11 percent increase in the cost of the beef stew.

Variables to consider:

- **Menu cost for exact menu as printed**—including the number of courses, serving sizes, and beverage selections. How are changes and additions adjusted or calculated? What happens to the food cost when half of your population expects juice at lunch and dinner and it's not on the printed menu? At 50 percent usage this will increase a \$2.50/meal cost by approximately 5 percent overall. Your cost per meal is now \$2.63! If you serve 10,000 meals per year, this simple change increases your annual food expense \$13,000! Consider that, not to mention the type of juice being purchased. Is it concentrate, frozen, bag in box, individual bottles or portion cups on this top-spend item?
 - **Acceptance of a menu is based on what the customer expects**—Does the menu format flow with the residents? What do they normally expect for breakfast meat daily? Will there be too many casseroles or sandwiches, or not enough of a certain item offered on the menu? How are special meals factored in or accounted for?
 - **Snacks included on preprinted menus**—Again, be alert to whether the snacks included on the menu fit your culture. Are your snacks more than just graham crackers and fruit juice?
 - **Exact recipes and products**—What are the assumptions used? Are they products you had? Will you make your beef stew or use a convenience item? Is this the same preparation used in the "known cost" menu? If not, how does that
- **Inventory to build up for the menu**—Exactly what will it take to get this new menu rolling? What is needed on the shelf that's currently not there? What is on the shelf that won't be needed?
 - **Exact recipe yields leftovers**—Chances are, not every portion will be used.
 - **Portion control**—Second portions and over-portioning impact costs. Is your staff using the correct measuring utensil? Do they understand how to calculate based on pan size or scoop?
 - **Shrinkage of yield**—The yield could be affected by production and cooking methods.
 - **Waste**—When your "as purchased" amount gives you much less "edible purchase."
 - **Specific products**—Is it the product your production staff is accustomed to? Is it bone-in or bone-out or ratio? Are you using the right product for the menu item? Are you getting increased value perception for higher cost items? The proposed menu likely assumes that all residents will be served the printed menu item. How many of your residents request a replacement item, double portion, or choose from the Always Available menu? It's inevitable that you will periodically have to offer a replacement or a second portion to your customer, so how are those variables factored in?
 - **Market fluctuations**—Is the data used to calculate the food cost still current? Have you looked at the price of tomatoes recently?
 - **Additional items**—Little things added mean a lot.
 - **Therapeutic diets**—What about variations for adding thickener or fortifying foods?
 - **Labor in production**—Do you have the equipment to cook the product in the manner in which it was factored? Do you have the skill or talent to prepare it that way?
 - **Centralized or decentralized service**—Each decentralized service point increases the cost. Can you calculate a percentage? Trays equal waste!

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- **Other variables**—This list is by no means comprehensive. Additional factors may come into play.

CONSIDER THIS SYSTEM

There's good news. You can navigate the world of food cost variables yourself and take hold of what affects it...and it can be done without spending days in front of a computer and shuffling invoices or searching online.

Consider these basic principles that may help you understand your food cost. The food cost on any menu has certain fixed or core costs. These costs do not change dramatically from place to place, because certain expectations are the same, such as:

Core Costs

- Condiments x 3: Sugar, salt, pepper, cream, butter
- Daily items: Juice, milk, coffee, other
- Bread, toast, etc.
- In theory, vegetables average the same cost after considering the variables (canned, fresh, frozen, high end).
- Starches can be averaged out to some degree as well.

Bottom Line Menu Costs

- The entrée and dessert become the variable and anomalies to the menu such as soups and appetizers.

Shop Costs

A colleague of mine explains it like this..."Shop costs" is when you take your car in for service. The shop does not charge you for every shot of WD40 and grease used in servicing your car. Instead, they develop an educated formula which covers these costs.

- There is a factor that should address the extra items—oil, salt, spices, onions, carrots, vegetable spray, soup base, and others. This can be a factor or it can be a percentage called the "Shop Cost."

Remember to factor in major differences in the proposed menu and what you have to offer, i.e., the proposed menu may offer soup twice a week, but you may offer it every day or even twice daily.

Once these things are factored, a base cost is established and from that a decision can be made for replacing core menu items that can directly affect cost.

Core items: Cost your top 15 or more core items in the following food groups and develop a cost range for each of them.

- Vegetables
- Starches
- Breads

Key areas: Entrées and desserts. Remember to balance the changes!

Other menu mixes: Appetizers and soups can be accounted for in the base cost or added to the key areas. If you can develop a cost range for them, a decision can then be made on "staying in the range." For example, maybe three home soups can offset the price of Lobster Bisque once a cycle.

If you have three higher-than-usual cost items, balance it out with three lower-than-usual cost items. Cost the core of the production: i.e., for spaghetti with meat sauce, cost the ground beef, spaghetti, and tomato sauce. The "shop cost" factors will cover the basil, oregano, other seasonings, and parmesan cheese.

Menu cost sample:

Shop cost is 8 percent. Consider how this shop cost will increase with lack of systems: order guides, recipes that are scaled and production sheets, training, and weekly production meetings and planning. Figure 1 provides a sample costing formula.

Understand the core cost of the entrée and dessert, and let the shop cost pick up the rest. If you have an entrée at 98, 78, 1.05

Figure 1

Sample Costing Formula			
Core cost:	\$1.34	For condiments, coffee, juice, milk	NOTE: Numbers in this sample are for example only and not based on actual costs. Each operator should determine specific costs based on their own operational particulars. Menu base cost: [Core plus Breakfast plus Bread (x2) plus Veg (x2) plus starch, condiments (x2)] Equals \$\$\$ PLUS (+) Entrée 1 and Entrée 2 and Dessert 1 and Dessert 2 TIMES (x) Shop Cost EQUALS (=) Menu Cost
Breakfast:	\$0.98	For eggs, breakfast, meat, toast, juice	
Lunch:	\$1.87	Veg \$0.24, Starch \$0.33, Bread \$0.12, Entrée \$0.76, Dessert \$0.42	
Dinner:	\$2.29	Soup \$0.32, Veg \$0.24, Starch \$0.33, Bread \$0.12, Entrée \$0.76, Dessert \$0.52	
SUBTOTAL	\$5.38	Plus 7% (shop cost) \$0.37 = Grand total = \$5.75	

make changes, the more days you cost out, the more precise your food cost. Remember to cost out both entrées and both desserts.

By using formulas such as the sample above, operators can make cost-effective decisions on products and replacements. Making educated menu changes and helping establish parameters on your terms of assumptions rather than the cost of a "menu as provided" or developed without daily considerations will help you more effectively budget your costs.



KEY POINTS

- Use a complete production system.
- Balance the sub.
- Cancel out high and low items against each other.
- Know product costs.
- Be consistent.
- Follow recipes and scale them to proper amounts.
- Work in seasonal specials when you can to increase customer satisfaction.
- Know yields.
- Ensure your equipment works.

- Educate your staff.
- Make it happen with solid production systems and training.

Understand all the other factors that impact cost per meal or go into your food cost, such as:

- Snacks
- Special meals
- Seconds
- Large portions
- Supplements or a fortifying factor
- Thickening agents
- Distributions
- Menu style or selection options
- Type of service.
- How items are presented or served
- Diet complexity
- Staff competency
- Equipment and new technology

Understanding these variables will allow you to operate with the control you want and the confidence you need to effectively understand the big picture of food cost.  

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Batch Cooking
Safety Steps

Corrective Action
Done Correctly

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Making Smart Choices



Meet the
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Next Great Baker



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The Trouble With Technology

by | Wayne Toczek

Technology is a funny thing. It can make your life easier, but it can present challenges of its own when not chosen or used wisely.

ANYONE WHO USES MICROSOFT OFFICE EXCEL can perhaps identify. Think of this scenario which you have likely run into at some time: An untrained user takes a pile of papers, invoices, or receipts to enter into an Excel spreadsheet, but rather than use the functions afforded by the program to keep track of totals, the user is tapping away at a calculator or adding machine to make additions and calculations of the items being entered into Excel. When the user runs into an error, he can't research the error on the calculator without starting over, or has to look over the adding machine tape to find the discrepancy. What's wrong with this picture? Excel has the capability to do the addition and make multiple calculations while keeping track of the items being entered. Additionally,

the user can readily see any discrepancies and edit them quickly, saving time and energy. Incredibly, this technology is right there in front of the user but is not utilized; and that is just a hint of what that program can do for users.

Did the user overbuy the technology or just fail to use it properly to reap the benefits? In many situations when people buy things for the technology offered, they are easily sold on the *potential* of the technology, but then fail to take the time or initiative to learn how to use it to their benefit. Or worse, people light up at the technology offered by the product, but never end up using it because they just don't need it, and therefore overbought.

When I started my business I purchased QuickBooks, and it was not cheap. So I maximize the features it offers, such as an electronic checkbook and electronic invoicing, and that makes

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the software cost easier to swallow. I've noticed other businesses, however, that still use handwritten checkbooks and mail invoices rather than sending them electronically, despite having QuickBooks on their computers. This example is not meant to offend anyone, but it illustrates the point that people often don't understand how to use the technology they've invested in and have available to them at their fingertips, simply because they don't take the time to learn how to apply it to their tasks.

The old saying from the book *Who Moved My Cheese?* comes to mind: "Change or become extinct." Technology waits for no one, and just as the fax is being replaced by the scanner and e-mail (which is good because home and office phone land lines are being replaced by cell phones), technology can save time,

“ Technology can save time, reduce paper, and organize your operation to make it more effective and efficient. ”



reduce paper, and organize your operation to make it more effective and efficient.

Printed cookbooks are now being replaced by electronic cookbooks. Think of what this technology has to offer chefs. It would be senseless to just print a recipe without first scaling it to the needed portion size and amount. All recipe programs have this feature, and one scaled recipe that reduces waste or over production will not only pay for the program, but also save more money over time.

Take note that some features offered by new technologies may seem like a great commodity, but are of no value if not useful to the operation, or needs of a business. Here are some examples I imagine we have experienced in our lives...When buying a new oven for your home, do you buy one with convection "heat" and pay extra for that feature, or do you simply get a standard convection oven? For your catering or special meals business, do you purchase a traditional butane burner, or do you get the newer technology—the induction burner? What is trendier and what is more practical? What are the limitations of each? Perhaps a particular plug must be used with one of them. Maybe the other poses a fire hazard.

I recently had a meeting with a colleague and we marveled at how technology has come full circle in the foodservice industry. We compared simple plastic tray cards listing likes, dislikes, and other pertinent information, to complex tray cards listing more than you would ever need or could ever read, back to a simple need for data and logical sorts. Culture has changed and technology is adapting.

Knowledge is powerful, and knowing what features technology has to offer which will be beneficial versus what will be of no benefit can be invaluable. I find it interesting to ask an equipment salesperson if they have used the equipment in an actual operation, and if so, were the features they are highlighting beneficial, or is the salesperson simply quoting the equipment's user manual and selling the nice-to-have features. For example, having a digital electronic panel versus a dial on a piece of equipment. What is more productive, and more important, what will be used? Ask questions. A friend was telling me about his equipment and a feature called thermostatic cooking. I asked what it was and how it was important to the user. He explained in simple terms how the equipment is used in an everyday scenario and therefore how it was important to the user, and I found it to be a differentiating factor or technology with its competition.

Sometimes, once something is bought and actually used, the features sold or presented do not work out the way they were perceived to. Then the user tries desperately to get assistance from a "help desk," but the person working there has never

operated the equipment in an actual operation and cannot relate to what the user is trying to do. The communication gap is frustrating. The help desk is talking in technical terms and the user is then confused and asking, "What is that?" rather than getting answers that can be readily understood. Sometimes you hear "A click of the button" and reports come out, but they are not what you thought they would be. Now the expensive program that was meant to allow you more time to engage in the operation becomes nothing more than another nuisance to deal with, and you begin to use only limited features and circumvent half the features that were the reason you originally bought the program.

This often happens with vendors. They have great order programs that, unfortunately, are designed more for the warehouse than the user. Often, rather than creating an order guide, the manager uses an order history that may be loaded with things such as one-time buy items to five different types of something, say for example, tomato sauce. The program is not set up by week or based on the menu. The manager then ends up doing that on a tablet and spends more time cherry-picking items and often deal items that are sometimes marked or have a flag to alert the user if the item is missed. The process is further complicated by limited rhyme or reason to the order. Items are not organized as they should be by sheet to shelf; they are just randomly somewhere on the sheet, and in too many instances, the user ends up calling the sales rep for help finding an item. The whole order process becomes too complex, and not understanding features has created unnecessary work and stress.

Is it not worth learning how the system thinks and what it can and can't do before recreating the wheel? A good example is taking inventory. Many great managers spend hours on Excel creating formulas and entering food items to cost out. Some software has that function, but if not, why not create a fake order based on what you have and let the vendor software cost it out? The manager thinks, "Well, every item is not on the order." So what? Learn to be consistent on what you inventory and how. If you count a roast that has been cooked off one day prior, but it's reduced in size, count it as it was before cooked. Say it was used that day and half is left over; maybe you don't count it then. The important thing is to be consistent on what you count and when it counts. Open spice jars do not count, but on the shelf they do, and so on.

EVALUATING A FOOD VENDOR'S SOFTWARE

So how do you evaluate a food vendor's software to make sure it's productive for you and will make your job easier? Think about these questions, make sure you know how to use the software, and ensure your vendor takes the time to train you.

“Some features offered by technologies may seem like a great commodity, but are of no value if not useful to the operation.”

- Do they speak your language (layman's terms) or expect you to learn their technical language?
- How does this save you time and make your life easier?
- Is it simple to use?
- Can you be trained and then do you understand the functions and are they easy to perform?
- Does it make sense, like ordering from eBay or an online store or getting on Facebook?
- Does it have a *save* function in case you accidentally get booted out? Nothing is more frustrating than creating an order and then losing it all.
- Can you export to Excel if needed, or vice versa, to make customizing and e-mailing easier?
- Can you create your own customized order guides, not order history, but actual named order guides?
- Can they be easily sequenced to meet your needs and your storage areas?
- Can you search by name, cost (price range), and size? In other words, can you filter your search so you find what you want, not what the vendor wants you to see?
- Can you recall an item you may have ordered in the past?
- Can it provide instant electronic copies of invoices that can be forwarded to accounting once approved or researched if lost? Why not? Have you asked?
- Are you given advance warning on substitutes and options? Can you make the decision on the substitute item, since it's in electronic format? And in real time, will you be notified in advance or surprised on delivery?
- Thinking ahead, can you track your order, much like UPS or ordering from Dominos?
- Can you see the credit appear online in a day or so? Snail mail takes too long and requires too much energy.

EDUCATE YOURSELF AND YOUR BOSS

When you are told that the vendor has a menu at a hard-to-believe cost, do not automatically believe it. There are too many variables, i.e., what about the other items, such as milk

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“If you understand what you are buying and the capabilities of the program or equipment, your investment will pay off in multitude, and you will see benefits follow.”

and dairy? Where do they fall in the mix and what about other factors that affect food cost—over production, environmental or economical effect, yield, case size, etc. Educate and explain to your boss how in a perfect world that cost might still be impossible. Even more, what do the products on the menu taste like? Can your clients relate to the menu? What effect does every change in the menu have? In the end, question, and investigate claims. Remember, perception is your superior's reality at times.

THINK ABOUT TRAINING AND SUPPORT

Find out if a program and its features are intuitive, whether it takes days of intense training, and whether you can purchase various support plans. A good program thinks like the operator, not like a programmer. Being intuitive is key. The program should make sense to even the novice, if possible.

Are you locked in the program and not able to get out without starting over? Nothing is ever really free or without strings attached. The offering of a program is much like a free dispenser, however maybe only that company's product will fit with the program. Yes, particular options may work with the program, but only if you buy the brand offered by the program's company. It may be that the program's expectations or restrictions are being sold as a benefit. The startup time in using a new system with only its products will be a waste of time and resources if you change your mind soon after purchasing the program due to its restrictions on expectations not known to you at the time of purchase.

I'm also skeptical of software changes requested by users that require approval from the software company when it's basic and simply makes sense to upgrade the software to be more user-friendly. I, as well as you, assuredly find it frustrating when the user is not empowered to make adjustments after business hours or until the next business day. This often shows a clear lack of understanding of users' needs. Imagine telling your customer, "We will get you that cup of coffee by the next business day or so, during business hours." In today's world, with all the technol-

ogy available, that should never happen, but does the product you're buying understand that it shouldn't happen—that you should be able to operate outside standard "business hours?"

BEWARE OF BELLS AND WHISTLES

Sometimes when it sounds too good, it may be. Alternatively, maybe the amount of time spent setting up and maintaining some new technology warrants the result and the cost or a feature that can help produce a superior item if the feature is used correctly. Just make sure you know what you are getting and what it can and can't do. I don't like hearing sales reps say that at the click of a button you will have a complete order, or program this in and you will have the perfect roast by using number 4 on the key pad. Consider if the price is actually worth the extra features or technology. How will it pay for itself or offer improvement to you, the user?

DON'T DISMISS THE HUMAN ELEMENT

Perpetual inventories are for department stores and grocery stores. Not understanding that will only result in disappointment to any other user. Programmed cooking times must consider various factors; the human element comes into play in this situation. Shame on the buyer who does not ask questions first. Don't get me wrong—some technology is just as simple as your microwave's popcorn button, but even in that example, human interaction cannot be dismissed. Sometimes you need to open the microwave door to stop the cooking prior to the programmed running time.

So this new program you are learning about can cook the perfect roast or can generate an order list for the menu. Remember, however, that the actual list of items in the amounts needed are only as good as the updated counts. Last-minute usage based on late changes, condiments, recipes and current inventory, not to mention leftovers, and the tracking of over and under production all need to be taken into account. All require the human element to kick in and assess these factors. What if you work in a CCRC and maybe do not or will not use the system for all aspects, then what? You buy a different system for each aspect? Or can there be integration? If not now, then in the future? Will anyone in the software company listen and validate your concerns or needs? More importantly, will they even *understand* your concerns and needs?

SOME STANDARDS DO NOT CHANGE

No system will ever completely take the place of the human elements such as forecasting, historical trends, the weather, payday for your retail area, and other variables that can never be input as a definite into a computer. The computer is only as good as the information put into it; it is unaware of last-minute changes

and additions. Use the information as a reference, but be leery that complete blind faith is disastrous. Hence, a simple click of the button can never do it all. New technology that heats a peller in 30 seconds will not save time or space, and even more important, reach the correct temperature if the pellet is not on the charger for 30 seconds. Buyers beware, ask questions, see it in action, and get references from actual users—not the sales and marketing team. Think about where you are left as technology changes, whether you can upgrade like an Apple iPad at Best Buy, or whether you will be stuck waiting another 20 years for the equipment or program to depreciate. Make all of this a part of the thought process and actual discussions.

WHAT YOU SHOULD UNDERSTAND

Always understand the assumptions of a program or piece of equipment. Spell Check is a great example and now even auto-

“ The computer is only as good as the information put into it; it is unaware of last-minute changes and additions. Use the information as a reference, but be leery that complete blind faith is disastrous. ”

check and fill-in programs all have one thing in common: they don't know exactly what you are saying. They give you variables based on what you have input, and ultimately you pick the correct variable. I'm a notoriously bad speller and rely on a human editor, simply because even Spell Check does not cover all the bases. They're, there, their—which is it? A program will not know which is the correct variable. Understanding how the program thinks can save you time and trouble later, so don't hesitate to ask questions of the sales reps. Are they a user from the past? Have they worked a day in your shoes to understand what's important to you? If they have not, ask to talk with a current user or, better yet, visit one.

KNOW HOW TO MAXIMIZE

Remember the old saying, “If you don't take the time to do it right the first time, when are you going to have the time to fix it?” Rest assured, you will not have time to fix things later. Rather, people will often continue to jump through hoops and take unnecessary steps to get something where it needs to be, instead of taking the time to fix something so it operates cor-

rectly to the user's needs. So keep this in mind—invest the time to set up the software or equipment to your specifications from the beginning. If you understand what you are buying and the capabilities of the program or equipment, your investment will pay off in multitude, and you will see benefits follow.

HAVE REALISTIC EXPECTATIONS

Expect the technology to make your job easier, solve a problem, and reduce mindless tasks. Expect the technology to keep you more organized or allow you to make better decisions and give you more time in front of the customer. Expect and ensure that the time invested in a new program will warrant a return. If you have to add hours or dedicate more time to get results beyond the startup, is the end result worth that extra time and dedication? Will it even be used or seen as a value to you?



For example, do you have a steam jacket kettle and your cooks still use boilers to cook soup because the production staff does not want to clean the equipment?

If you believe, they will believe. Get your staff involved in demonstrations and let them ask questions or pose arguments if needed. Actual user input is invaluable. Remember the story of the truck stuck under a bridge and all the engineers trying to figure out a solution? Raise the bridge, cut the truck, or pull it out...and finally the little boy who said, “Can't you just let the air out of the tires?” In the end, the technology you are purchasing is being used by your staff as well, so staff involvement counts.

MAXIMIZE RETURN ON INVESTMENT

Inevitably, you must calculate whether there is a payback on your investment. I recently spoke with an owner of a self-storage company who had mailed an invoice to me. For starters, he had my name wrong on the invoice; but then when I paid the invoice, he was confused as to why I was paying him

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because the check was generated from my company account. Consequently he called to ask what I was paying him for. I inquired why he could not have cross-referenced the address on my check with the addresses to which he sends invoices. He replied, "I have 500 units." I asked why he couldn't look at them electronically. He simply said, "No, that is not how we do it." I wondered then and asked him, "You mail out 500 invoices every month?" Think about that. At 44 cents per stamp, 500 invoices mailed out 12 times a year, the cost of stamps and envelopes alone is at least \$2,700. If this business owner would use the technology of Quick Books or any other accounting program, he could e-mail a majority of the invoices rather than mail them. Even if only a quarter or half of the customers had e-mail access, he would save money, not to mention his valuable time. His comment, however, was, "We have a system already; it prints labels and we can't look at anything else." Clearly, the idea of learning to use technology to his advantage was beyond his thinking. He spent valuable time and money printing invoices, stuffing them in envelopes, licking envelopes, and buying and sticking postage stamps on the envelopes. Yes, his system works, but his failure to embrace or even research time- and money-saving possibilities is just inconceivable. So, when you are presented with technology, look beyond now.

Ask:

- Will it save me time? If so, can I re-invest that time to improve my business or operation?
- Is there an investment payback?
- Will it grow with the business needs?
- Will it help solve a problem that is important to my operation?
- Will I be able to, and will I, use it correctly and will my staff?
- Can I make a task easier and therefore save on labor?
- Can it compensate for human error?
- Can it make an average result a better and improved result?
- How long will it take me to begin using it correctly so that it is advantageous to me?
- Does the person explaining it comprehend a day in your shoes, actually using it?
- Is there a case study and users I can talk with?
- How much support will be provided to me?
- Anything else you see as important.

In many ways you are already using technology to your advantage—perhaps you pay bills online, saving you the cost of stamps and, more important, maybe even avoiding late fees. Paper reduction and cashless transactions are the way of the future. Some standards are already set, such as electronic statements. Even department stores now offer online receipts and some provide a lookup of your account by the credit card you used. Technology is moving forward with or without you, and failure to utilize it properly can eat up the one thing that we only get so much of—time. Whether it's digging through mounds of paper, or tallying items by hand, most technological advancements can be learned in little time.

SUMMING IT UP

Embrace the future and the many forms of technology available, but do your homework and know exactly what responsibilities and obligations you will bear to get the most out of your investment. Understand the difference between "must have" features and "nice to have" features, and whether you can get what you need from it or if it's too much or too difficult to learn. Knowledge is power. Educate yourself and understand what your [I mean "you're"—that darn Spell Check] getting and not getting with the technology out there. 🍷

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. He's author of *The Dining Experience* and *The Customer Experience*, and co-author of *Food Service Tune Up* and *Safe Dining for the Highly Susceptible Customer*. Contact him at (419) 863-9300 or visit www.innovationservices.info

Food Protection Connection



Following are answers to the "Food Safety When Batch Cooking" review questions printed on page 16.

1. B 3. C 5. A 7. B
2. A 4. B 6. C

Please remember to complete the two short essay questions before submitting the CE form.

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Feature Article

Changing the Culture in Your Facility

by | Wayne Toczek

The push for resident-centered care that began several years ago has brought a number of positive changes to dining services in care settings. But improving resident satisfaction through culture change is an on-going process and requires flexibility and a willingness to adapt along the way. Most communities strove to eliminate trays from being used for meal service in the dining room and introduced a fine dining experience. It was often said, "We want residents to feel like they are in a restaurant enjoying a great meal."

Communities then created grand dining areas which management thought would be an exciting place to eat. The thinking was that if residents wanted a great meal with several choices, they should come to the dining room. The new dining room opened with great fanfare at most communities. Then a new reality set in—not all residents wanted to come to the dining room to eat, especially when they needed to come multiple times a day at specific times. New obstacles to resident satisfaction became evident.

With the best of intentions, several factors were largely overlooked until after the new dining room was open—the length or difficulty of the commute from resident room/apartment, the dining room operating hours, staffing for excellent service during all service hours, and defining and communicating the culture change needed to provide the service residents wanted. In many communities, fine dining meant that residents still completed paper-based menu selections of some type, the food was placed on a tray for each resident and removed from the tray at tableside. This resulted in more steps (more work) for the staff, and the resident saw little change beyond the physical dining space.

How can we fix the problems? First, define what fine dining will look like in *your* community. It is unlikely that two communities will have exactly the same definition if they base their definition on what it means to current

residents. What are residents' menu expectations? How should your staff look? Do residents want Ritz-Carlton service or family restaurant service? Do they desire a formal dining room or a more relaxed atmosphere? Do they want defined meal times, or would they prefer all day or even 24 hour dining—with featured meal items available at certain times and a la carte items always available?

After you know what type of service your residents want, develop a plan to get you there. Why not shake up your current staffing pattern, job routines, and service procedures? Pretend they don't exist and determine what's needed to achieve the goals you have just defined. Now, use these new routines and procedures to determine the adjustments you need to make in your operation to make the change happen.

Consider some of the following when making your new plan:

- How are you going to communicate your new customer service focus to residents, dining staff, and employees in other departments? Who do you need to recruit as partners in your plan—Nursing? Activities? Environmental Services? Maintenance? Administration? Others? Who will do the training? How much training is needed? Don't skimp when it comes to training or you will pay later, both financially and by not achieving the results you expect.

- Change your approach. When you are tempted to say "We can't do [blank] because..." —stop yourself in mid-thought and say "What do I need to do in order to accomplish [blank]?"
- Why not eliminate individual trays completely? How many residents asked that their food be served on trays when completing their pre-move-in information? Why not place meals for several residents on a single serving tray like restaurants do? That makes it easier to serve all at a table at the same time, and results in better service with fewer trays to wash (as much as 25 percent less work). Why not serve dessert after residents finish their entree? Most residents were eating their dessert at the end of their meal when they arrived at your community. If they want it first now, it's because you trained them to want it first by putting it in front of them when the rest of the meal was served. Have you considered family style slightly modified to offer more assistance?
- How many residents stated specific times they wanted to eat their meals? For those who did, how does that time sync with your service times? What would you need to do to offer a continental breakfast until lunch time? How about offering homemade snacks between meals? What could you do to make meal service available from 7 a.m.-7 p.m. (or any other hours giving all day service)?

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- And now let's get rid of those paper selector sheets (or whatever they may be called in your community). When your residents were at home, do you think they circled what they wanted to eat and handed it to someone to fill the order? We have even trained residents and their families that it's normal to choose their meals as much as a week in advance. How about getting rid of the paper and *asking* what they would like for dinner? There's less waste, it's more personal, and there's no problem trying to read writing made difficult by arthritis.
- What about snacks? Do you think outside the box? Is there more to snacks than Lorna Doones and graham crackers? What do you like as a night-time snack? How should snacks be distributed—by Nursing, Activities, or another department? Ordered at dinner time and distributed at the end of dinner or at a later time? Could distribution become an event instead of a task?
- If the goal of a snack is calories and protein, what food items can meet those requirements instead of the ubiquitous health shake?

Begin changing the culture in your community by first understanding that each meal is an experience the dining services department provides; it is not a task of traying food and sending it out three times a day. Bear in mind that choosing what they would like to eat is one of the last things residents are able to do for themselves. It should be an enjoyable experience.

In today's senior living communities, everyone is part of the solution in successful dining programs. Those who aren't are part of the problem. Everyone employed by your community is there to provide care for residents. Serving meals, passing snacks, even cleaning up after a meal is a part of providing quality care for residents.



What about snacks?

Do you think outside the box?

What do you like as a night-

time snack? How should

snacks be distributed—by

Nursing, Activities, or another

department? Could distribution

become an event instead of a

task?



Comments like "I am not a waitress...I did not sign up for this" have no place in an environment where everyone's focus should be on doing what needs to be done to care for residents. Providing a nourishing meal is care, and when it came from a cart with trays, no one blinked. Step back. Count the steps of tray service and you will likely see it as a labor-intensive process when compared to direct service at the table. Departments need to be interconnected in the provision of seamless excellent care.

Now that you have defined your vision, created a plan and implemented it, you need to keep listening to your residents and the marketing department. The marketing department is in the business of recruiting new residents, so they will have direct feedback when potential residents choose a competitor. How have expectations changed since last year? As the Baby Boomers start moving in (there are now Boomers on Medicare), there will be a whole new expectation. Different work will be the new normal.

Remodeling or updating your look? Remember to include the ability to do some items short order in your plans. How much better is a grilled cheese sandwich cooked when ordered than one cooked a half hour ago in the kitchen?

In addition to wanting to choose what, when, and where to eat, you should anticipate more requests for healthy options and lighter fare. Expect more requests for information about these choices—how they are made, what ingredients they contain, even nutrient analysis. These residents will likely expect that you will be following the example of the restaurants they visit/visited. Bob Evans has been catering to seniors for years. All-day breakfast is part of this...so how about brunch as an occasional option? Some breakfast items available all day?

(Continued on page 30)

The Dining Experience Transition Information

To make _____'s transition experience as pleasant and seamless as possible, we want to share some things we know about this resident that he/she might not be able to communicate. This information is based on our observations and may help you make the resident feel more comfortable in their new surroundings:

BREAKFAST

Resident typically eats breakfast: At Home In Café In MDR

Usual breakfast beverages:

Milk	<input type="radio"/> Whole	<input type="radio"/> 2%	<input type="radio"/> Skim	<input type="radio"/> None
Juice	<input type="radio"/> Orange	<input type="radio"/> Apple	<input type="radio"/> Cranberry	
Tea	<input type="radio"/> Hot	<input type="radio"/> Cold-no ice	<input type="radio"/> Iced	<input type="radio"/> Decaf
Coffee	<input type="radio"/> Cream	<input type="radio"/> Sugar	<input type="radio"/> Sugar Sub	<input type="radio"/> Decaf
Other				

Usual breakfast consists of:

Hot Cereal	Favorite:	_____
Cold Cereal	Favorite:	_____
Eggs	Type:	_____
Bread Product	Usual:	_____
	Favorite:	_____
Condiments	Usual:	_____
	Favorite:	_____
	Special:	_____

Additional information that will help get the daily dining experience off to a good start:

LUNCH

Resident typically eats lunch: At Home In Café In MDR

Usual lunch beverages:

Milk	<input type="radio"/> Whole	<input type="radio"/> 2%	<input type="radio"/> Skim	<input type="radio"/> None
Juice	<input type="radio"/> Orange	<input type="radio"/> Apple	<input type="radio"/> Cranberry	
Tea	<input type="radio"/> Hot	<input type="radio"/> Cold-no ice	<input type="radio"/> Iced	<input type="radio"/> Decaf
Coffee	<input type="radio"/> Cream	<input type="radio"/> Sugar	<input type="radio"/> Sugar Sub	<input type="radio"/> Decaf
Other				

Usual lunch consists of: Soup Salad Sandwich Hot Entrée

Favorites: _____

Does Not Like: _____

Condiments Usual: _____

Favorite: _____

Special: _____

Additional information we should know:

DINNER

Resident typically eats dinner: At Home In Café In MDR

Usual dinner beverages:

Milk	<input type="radio"/> Whole	<input type="radio"/> 2%	<input type="radio"/> Skim	<input type="radio"/> None
Juice	<input type="radio"/> Orange	<input type="radio"/> Apple	<input type="radio"/> Cranberry	
Tea	<input type="radio"/> Hot	<input type="radio"/> Cold-no ice	<input type="radio"/> Iced	<input type="radio"/> Decaf
Coffee	<input type="radio"/> Cream	<input type="radio"/> Sugar	<input type="radio"/> Sugar Sub	<input type="radio"/> Decaf
Other				

Usual dinner consists of: Soup Salad Sandwich Hot Entrée

Favorites: _____

Does Not Like: _____

Condiments Usual: _____

Favorite: _____

Special: _____

Additional information we should know:

Please feel free to contact me/us for additional information

Completion Date: _____

Take a different look at menu writing. Do you really need 35 days of a menu that will repeat, or do you need seven good days of breakfast, rotating specials, and an evolving menu of 21 or 25 days that is more of a living menu than a traditional cycle menu or a menu not divisible by seven? You would certainly never have a Meat-loaf Monday again when considering any of these options.


How many different breakfast menus do you really need? Twenty-eight or 35 breakfasts might sound good, but is it the place to spend your time and money? Most of your residents spent 50 years eating the same thing for breakfast every day and you are trying to give them variety—variety they probably don't want. An occasional offering of pancakes or French toast

is more likely what they are looking for. Some communities are having success with a continental breakfast for extended hours, with hot breakfast available for a shorter period of time. Think your community isn't ready for this? Keep your eye out for the Baby Boomers moving in.

A friend of mine, who operates the dining services program in a CCRC,

mentioned how they spent hours "racking their brains trying to offer residents in the dining room a variety of alternative items" until they decided to try offering filet mignon. After surviving a couple of weeks of chaos created by residents ordering the steak every night before it went away, things settled down to occasional orders because the residents now know they can order it any night they wish. The result is less waste, less resident and staff frustration about variety, and better resident satisfaction.

Parting Thoughts

Make it a habit to think what you *can* do, not what you can't do. What will be cutting edge for your residents? Once you have answered that question, focus on how you can provide it. Don't forget the basics. There's no substitution for high quality food, excellent customer service, and a squeaky clean environment. Offering your residents options about what, when, and where to eat is a powerful way to satisfy those who can no longer make choices in other areas of their life. 

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. He's author of *The Dining Experience* and *The Customer Experience*, and co-author of *Food Service Tune Up* and *Safe Dining for the Highly Susceptible Customer*. Contact him at (419) 863-9300 or visit www.innovaservices.info

“ ” Take a different look at menu writing. Do you really need 35 days of a menu that will repeat, or do you need seven good days of breakfast, rotating specials, and an evolving menu of 21 or 25 days that is more of a living menu than a traditional cycle menu?

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by Wayne Toczek

Developing an effective production system is a worthwhile time investment that will pay big dividends in terms of productivity and cost savings. Components of an effective system are outlined here.

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Developing an effective production system is the single most important investment of your time in your nutrition services operation. A well-planned and well-managed production system is key to your success. Although keeping things simple is an important consideration, having production staff work directly from the posted menu is not recommended—no matter how small the operation. Data collection and organization is critical to a good production system. Correct data allows for better forecasting, ordering, and more productivity.

Components of a Production System

The components of a production system are all based on the menu.

A production system is defined as a set of written instructions to produce all food items needed for the day. These instructions include:

- Production sheets
- Steam table diagrams
- Standardized recipes
- Order guides

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Using a Production System

to Control Costs and
Improve Quality

by | Wayne Toczek

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. He's author of *The Dining Experience*, *The Customer Experience*, and *The Employee Experience*, and co-author of *Food Service Tune Up* and *Safe Dining for the Highly Susceptible Customer*. Contact him at (419) 663-9300 or visit www.innovaservices.info

Feature Article (Continued)

Surrounding the production system is a set of steps and skills that keep the operation running smoothly and help manage costs and maintain quality. These steps and skills include:

- Accurate forecasting
- Consistency
- Portion control
- Pre-preparation
- Production meetings
- Batch cooking
- Proper handling of leftovers

A production system that's properly set up will enable an operator to produce a consistent, high quality product and manage cost. It is critical to constantly monitor and evaluate the results achieved from following the production sheet and answer these questions:

- Was data collected correct?
- Was the forecasted number of meals accurate?
- Were portion sizes as served correct?
- Were the recipes followed?

Production Sheets

Production sheets basically outline the job routine for production staff. The production sheet should contain all the information staff needs to prepare the meals for today and to organize supplies and make preparations for the next day or two. Depending on the size of the facility, it may guide the work of the day at one workstation, several workstations, or the kitchen as a whole. It is also the place

to record deviations from the plan for the day, if they come up.

Production sheets should help and guide your overall production system, which entails these steps and skills.

Accurate Forecasting

Forecasting is not just for meteorologists. Accurate forecasting of production will help keep you out of trouble with your customers, your staff, and your boss. Many factors affect the amount of food your department should prepare for any given day, but with common sense and an understanding of the factors, the "over or under" production can be controlled. In situations where you are tracking customer counts, spending, and charges, consider a point-of-sale (POS) system. This can provide very

around you. Various factors affect the amount of food that will be consumed. For example, if it is a very hot day in your area, perhaps cold items will be more in demand and should be available.

Consistency

An old foodservice saying is "You are only as good as your last meal." A key ingredient in any foodservice establishment is consistency. Will the meatloaf taste the same today as it did last time and will next time? Your customers expect to know whether or not they like an item that's on the menu—not that they like or don't like it when a certain cook makes it. Is there a problem with the item? Is a recipe available and followed? Is the recipe extended or scaled to the correct amount for all ingredients and in



Portion control is

another critical step to ensure that you have enough food.

Portion control requires some specific equipment.

useful data and offer many nice features and benefits.

Forecasting means estimating how much food you will need without having all of the information you would like to have about the situation. A good operator will forecast the amount of food based on information—past and present—that may influence the needs for the day. To determine your estimate, consider prior cycle usage, today's census, weather, payday, events inside or outside your operation, day of the week, holiday, and other factors you think are relevant, compared with the same factors for past cycles. In other words, to make a good forecast you must be aware of happenings in the world

accurate measurement sizes? Are all recipe ingredients available? How do you know ingredients were ordered? Once you have answered these questions, make sure you follow-up with the action needed to prevent the same problem. Organizing data can be complex and time consuming, and POS systems with expanded capabilities can offer an efficient and organized manner of tracking this data and even incorporating it into your production system.

Portion Control

Portion control is another critical step to ensure that you have enough food. Portion control requires some specific equipment, such as:

- Scales, pound and ounce sizes
- Measuring pitchers, quart and gallon
- Measuring cups, dry and liquid
- Measuring spoons
- Scoops, spoodles, and ladles in sizes needed to serve your menu

Pre-Preparation/Freezer Pulls

Fail to plan and you plan to fail. Do you remember ever trying desperately to thaw a huge mass of product so it could be prepped for a meal? It happens all too often and results in shortcuts being taken that put food safety at risk.

Make a list of items to be pulled from the freezer two days prior to preparation day. Transfer this information to your production sheet...and don't forget, orders for those items must be in house the day before they need to be pulled.

Production Meetings

Production meetings should be held either daily or weekly, depending on the skills of your production staff and the complexity of your operation. Meetings provide opportunities to discuss all the components of the production sheet, any upcoming events, recipes, substituted products, meal changes for the week, and any equipment concerns impacting production. A culinary tip or two can also be shared with or by your production team during this meeting.

Batch Cooking

Batch cooking is preparing the same menu item several times during the meal service to ensure that the last customer gets the same quality product received by the first customer. This is most commonly used with menu items that have short cooking times, such as vegetables or items that will not maintain quality if held for extended periods of time, like fish or fried foods.

Timing is everything when it comes to giving your customer the best possible product and reducing waste. A good example of batch cooking is Mc-

Donalds French fries: an average store may go through 1000 pounds a day, but employees do not cook them all at once, they cook them in batches and time it correctly so there are always fresh hot fries.

Proper Handling of Leftovers

Management of leftovers should follow ServSafe guidelines: proper storage, labeling, dating, and reheating procedures. Here are a few tricks:

Portion soup in muffin tins and freeze. Once the soup is frozen, place the tins in resealable bags, label and date, and use for individual portions as needed.

Freeze items in resealable bags and in workable sizes. This will allow quick freezing and thawing. Label and date.

It's important to keep track of refrigerator and freezer temperatures. Use a chart to record temperatures daily

and include the initials of the person testing temps. Complying with HACCP principles can be a paperwork monster. Some systems on the market today can track, document, and alert managers to concerns in a proactive manner. Don't forget to dispose of items not used by the discard date.


Steam Table Diagrams

Steam table diagrams are a great way to ensure that steam table wells are used to the greatest advantage. Presentation should be considered if in a retail area; speed, ease, and accuracy of service should be the primary factors in situations where the customer does not see the steam table. Wells should be filled or covered if there is an empty segment. The configuration should factor in separation of hot and cold wells.

(Continued on page 36)

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Standardized Recipes

Use standardized recipes which list ingredients and cooking instructions for menu items. A standardized recipe has been adjusted to produce a volume of product that matches typical foodservice needs in your operation and the cooking equipment you use.

Using standardized recipes is critical to producing quality food. When recipes are carefully followed, the menu item will taste the same, regardless of who is cooking.

Recipes help in the management of food cost—the buyer knows how much to purchase, the cook knows how much to make, leftovers are reduced, excess food is minimized, and the menu item has the expected nutrient content.

Order Guides

An order guide can ensure ordering efficiency, stabilize inventory, limit substitutions due to run outs or overstocks, track and document product costs, help keep food cost on target, and allow a substitute to place an accurate order in the absence of your usual person. In addition, order guides contribute to food quality and safety by ensuring you order known products whose characteristics are suited to your recipes and production methods. When setting up your order guide,

- Complete a comprehensive inventory list of items required to produce the menu. Organize the list by storage area, in order of items. This list should flow from inventory sheet to storage shelves (“sheet to shelf”) and should not include dead stock.
- Set up the order guide on the computer so it flows in the same manner as your inventory list throughout all storage areas.
- Print a master copy; this will be the base for your order guide.
- Establish par levels for all par stock items and enter them on the master order guide.

- Take the menu and group the days together that equal an order. For example, if you have a five-week cycle menu and you order twice a week, you will have 10 groupings of orders. Order specific non-par stock items. Amount ordered should be:

- **Amount needed** for the order cycle
- **Minus** amount on hand
- **Plus** amount to be used prior to and including delivery date
- **Equals** amount to be ordered
- Use inventory list to complete a monthly inventory on the designated day each month.


Tip...Keep a separate order guide for your china, flatware, and serving utensils. Include par level, type, pattern, vendor, and any other specs that will help you order the same items.

Summing It Up

A well-designed system will help you effectively manage your food produc-

tion. Great systems are on the market and by understanding the features and how they can apply can offer automation and save time. POS systems can be more than a cash register. They can be advanced and cover many of the manual competencies of a production system in addition to the complex tracking and accounting information. A complete production system will directly impact

- Food cost
- Food quality
- Productivity
- Sales
- Budget
- Your job security
- Your department's reputation
- Customer perception
- Worker satisfaction

Carefully plan a production system that meets your department's needs, and you will save time, money, and improve customer satisfaction. 



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The background of the cover is a close-up photograph of a mango. The mango is mostly red with some yellow and green, and it is cut open, showing the bright yellow-orange flesh. The lighting is soft, highlighting the texture of the fruit.

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50 years
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When should I use industry benchmarks and when should I set my own standards?

On assignment with one of the largest CCRC organizations, I was asked that question, along with “What benchmarks should we use to compare our costs?” I was cautious not to provide a specific answer or standard due to a vast number of variables. If the question was “How should we be comparing resident satisfaction?” it would be easier to answer. Even comparing health inspection results would be relatively straightforward— but cost is a mixed basket of fruit and is not easy to meaningfully compare.

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The Fruit Basket Approach

to Evaluating Benchmarking

by | *Wayne Toczek*

All things being equal, benchmarks are good tools to determine where your operation falls in comparison to others. Beware—are you comparing apples to apples or are you comparing apples with, let's say, grapefruit? What should you, the director, do when you are instructed to explain or adjust to meet the benchmark? Benchmarking with customer satisfaction is played on a reasonably level field when comparing the answers to the same questions administered by the same organization. Customers can be very satisfied and very unsatisfied.

What about looking at financial data—Is your cost per meal higher than the average cost? Does your labor exceed the average, or what about your productivity? How do you react or explain the variance based on the data produced by the accounting firm that is sharing state averages or industry standards? For starters, it is good to determine how you compare before you start breaking down the variables. Banks love benchmarks for determining the viability of the organization. They have formulas and allocations for extracting whether the organization is on the high- or low-side of the industry. The variables range in all areas from food cost, labor, services provided, and supplies. Within all these areas are even more variables, depending upon the type of foodservice business you are operating.

So how do you begin to attack this puzzle of financial benchmarks to determine if it is valid or not? Is it a comparison of the same fruit or a mixture? If you are comparing apples, are they all Granny Smith or are some Yellow Delicious?

You should make sure that what is being measured is the same—that all participants are using the same criteria to input data—before you begin comparing your operation to a benchmark. Imagine using a food cost per meal benchmark to compare a fast food service, full service restaurant, and a casual buffet. There are so many variables in this scenario that comparison would be meaningless. If you upscaled your dining program to achieve a better census, is the benchmark still relevant? Probably not, but you need to do a little detective work to be sure.

With the experience of dozens of sales surveys and proposals for contractors, I personally would not use a benchmark as a way to develop or evaluate a program. I base it on the vision and then what it takes to deliver that vision based on assumptions, styles, and other variables. In reality, you are setting the benchmark and measuring annually against the prior year. Historical data and trends particular to the operation typically provide more reliable comparative information than benchmarks because the variables have been neutralized.

When dealing with food cost

the common formula of cost per meal or per day can help make the data comparable... However, some common pitfalls can skew the numbers.



Apples to Apples: Food Cost

When dealing with food cost the common formula of cost per meal or per day can help make the data comparable, right? Well, sort of. Here are some common pitfalls that can skew the numbers:

How are meals counted? How complex is the menu—non-select, selective for some or all, restaurant style? Do all benchmark participants belong to the same GPO with little else in common? Are participants all members of a CCRC chain? Do you or some of the participants have a religious affiliation, such as Kosher or Seventh Day Adventist, that could skew the comparison to those who don't have the same affiliation? Do all participants account for all food that leaves the department, such as food supplies to healthcare units, in the same way? Does staff eat free? If the answer is yes, are these meals recorded as meals? Are your portion sizes the same as the benchmark operation? Do you have to use more prepared food items because you lack the equipment or trained staff to produce from scratch? Any combination of these factors can result in a very appropriate food cost for your operation that is anywhere from the "magic benchmark" to the highest cost in the group being compared.

Oranges to Oranges: Labor Cost

Now that we know how difficult it is to equalize variables when comparing food cost, let's explore what we need to know to meaningfully compare labor cost. Though there are not as many variables in labor hours, here are a few questions to answer in response to your boss's question. If you are comparing meals per man hour, how are meals counted and are the labor hours productive hours or total hours paid? Is your operation a union shop while others are non-union, or vice versa? What is the skill level of your staff?—do you have a chef and well-trained staff and are comparing your operation to one with less skilled labor using primarily prepared foods? Are you comparing a central kitchen supporting a community to one that has a completely separate kitchen staff, menu, and inventory to serve various customers? Does staff from other departments assist in the service of meals at your operation or theirs? How do your hours of operation compare to others? Is it fine dining that is open all day or just for dinner? Are breakfast, lunch, and dinner served in multiple dining venues or are meals delivered to healthcare units and everyone else eats in a single dining room? Buffet line or waitstaff service? Any combination of these factors can result in a very appropriate labor cost for your operation that is anywhere from the magic benchmark to the highest cost in the group being compared.

Pears to Pears: Meals

Regarding meals served, who is counting what and what is considered a meal? Is a single cup of coffee and doughnut a meal, or do three coffees and doughnuts equal a meal? Are catering dollars converted to meals? Do cookies and coffee for 150 people equal 150 meals, or do you have a meal equivalent factor to determine meals? Now the million dollar question: do others participating in your benchmark group have the same meal equivalent factor? If not, comparer beware!

You'll want to answer a number of questions in order to determine accurate labor costs for your foodservice operation.



Peaches to Peaches: Salary

Though compensation for dining services directors is not benchmarked per se, when seeking a new director, the salary paid is often compared to dining services directors at nearby competitors. Human Resources departments often try to make the dining services director salary fit on the same scale as other directors, aware that moving it up might infringe on the compensation territory of executives. Managed volume, number of residents or customers, and total meals served are often used to group "like" operations. These generic measures can be misleading.

When seeking a new dining services director

the salary paid is often compared to dining services directors at nearby competitors



Before falling into this trap, make an honest assessment of the responsibilities of your dining services director. Are the majority of meals prepared for a single customer (i.e. health care) or do you serve multiple customers daily (i.e. health care, assisted living, independent living, staff, visitors, catering for residents and community organizations, etc.)? If your compensation package for the second example is less than twice that for the first, you are setting yourself up for disappointment.

How many small businesses does your dining services director operate? The number of different service types, as well as service locations, plays a part in determining this

(Continued on page 20)


Feature Article (Continued)

number. How many regulatory agencies review services provided by your dining services department—local and state health departments, department on aging, child nutrition, etc.? Each one requires an additional level of expertise that should factor into your compensation formula. Now, contrast the responsibilities of your position with those you are comparing it to and establish a fair compensation package for your specific position.

Be skeptical about any benchmark that is not clearly defined, given the number of variables. Take a hard look at your dining services operation. Are you maximizing the opportunities offered by your GPO? Look in your garbage cans—are you managing production effectively? Review service records—are you serving replacement items to a number of customers? Take action to correct the problem if you are. Is your staff busy or standing around discussing who will win the Super Bowl? Are you meeting your budgeted goals? Your best bet for optimal financial performance comes down to six steps:

1. Create your vision.
2. Study benchmark data.
3. Zero base a budget to achieve your vision.
4. Develop and implement systems needed to achieve your goals.
5. Monitor your progress and take intermediate action as indicated by observations.
6. Enjoy your achievement and share how you did it with others.

In a Nutshell

Don't ignore benchmarks, but don't follow them blindly or let them interfere with achieving the dining services goals that will make your operation the benchmark for best value for customer service and satisfaction. 

Wayne Toczak is CEO of Innovations Services, Norwalk, OH. Contact him at (419) 863-9300 or visit www.innovationservices.info

Setting Up Zero Base Staffing

Set up a grid for all positions and begin filling in information. Start with meal times, lunch breaks, and other breaks. Then add tasks in one hour blocks or half hour blocks. This can be set up on a computer or on poster board that has ghost line blocks. Once this entire staffing grid is complete, you can easily create individual job sheets, but keep the large grid as a working plan. Look for down time and overworked positions, determine whether breaks make sense and if someone is always in the kitchen, and address other critical tasks.

Position Name	6 am	7 am	8 am	9 am	10 am
AM Cook	Cook in, begin breakfast production		Breakfast service		
AM Aide		Clock in, set up meal area		Break down	
AM Waitstaff		Clock in, brew coffee, set tables		Clear dining room	

The goal of the grid is to provide a way to see everything being done in a day and evaluate the validity of tasks. When managers and supervisors complete this grid, they learn a lot and are often surprised at how long certain tasks take for staff to complete versus how long tasks should really take.

For example:

Breakfast starts at 7:30 and the a.m. cook comes in at 5 a.m. What is accomplished in 2.5 hours?—water boiled for cereal, bacon in oven, and eggs on the grill. You may see that this person can arrive an hour later and still meet the timeframe — plus there is more time to actually see the position working versus the employee working alone in the kitchen for 1.5 hours before management arrives.

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Leading

During Tough Times

Managing Food Costs

Keeping the Budget in Check

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by Wayne Toczek

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by Diane Everett

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Managing CFOOD Costs

by | *Wayne Toczek*

From the Vendor, to the Kitchen, and From Your Desk

Food cost is a never-ending topic of discussion in this business. Many factors impact the cost of food, and if all points are looked at closely, successfully managing costs can be easier than you think.

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Join a Purchasing Group

Joining a purchasing group can be the best single investment in managing your food costs. The key is to compare apples to apples and understand the terms of the agreement. Use a market basket to compare purchasing groups. This market basket should be your top 100 order items in the quantity needed for a month.

Order From the Vendor Specified by Your Purchasing Group

The goal when ordering food is to buy with confidence—that's the reason for joining a purchasing group. One of the best ways to realize savings before food comes in the door is to purchase "deal" items; these are the items that have special pricing negotiated for you. You can easily determine what your "deal" items are because they are generally listed by your purchasing group. Here are some other ways to manage your costs before food comes in the door:

- Limit the number of orders per week. This allows you to take advantage of volume incentives.
- Order based on a Visual/Physical inventory.
- Be aware of portion sizes of items.
- Look for yields.
- Look at buying bulk snacks versus pre-wrapped individual items.
- Use an order guide based on the menu.
- Plan ahead for the salad bar. Use in-season items as much as possible.

Manage Foods Costs In the Kitchen

Once food arrives in your kitchen, these tips will help keep costs in line:

- Always check in the order—miss-picked items are common with even the best companies. Check labels and look for damaged products. Make sure damaged items get returned. Designate an area and have your rep do the work of making sure credits come back for damaged goods.



Vendor

- Follow storage guidelines outlined in the FDA Food Code.
- Use recipes to determine the amount of food you are going to produce. For example, if roast beef is on the menu and the portion size is 4 oz, then for 100 servings you need about 35 pounds. Consider using the drippings for making gravy. Roast correctly to realize the best yield.
- Calibrate your ovens. Use an oven thermometer to ensure the temperature is correct.
- Use a scale to make sure that, when sliced, meat portions are the appropriate size. Adjust your slicer blade correctly based on the size. Keep the blade sharp and clean.
- Follow the extension sheets for portion size. Recipes are scaled based on portion size, so if the utensil or cut is wrong, you may run out or have too much left over.
- Use production sheets to help guide the cooks to produce the correct amount of food. Record left-over food to help determine how much to make next time the cycle repeats. Always make sure the starting amount is correct when recording the over- or under-produced amount.
- Follow a salad bar rotation guide. This allows you to offer variety

while managing the amount of salad offered. Develop a rotation to follow versus just filling up containers.

- Consider setting up a puree molding program and utilizing some foods that might typically have been thrown away for this program. This can be incorporated into your production sheet.

Manage Food Costs from Your Desk

- Track your weekly purchases.
- Know your census and customer counts.
- Use a spend-down sheet based on your census.
- Use your ticket program to print a diet tally. Share this with the cooks.
- Use dislike reports to determine what substitutes to offer.
- Review your purchasing descending dollar report from your vendor/order system (request this from your vendor if you don't have electronic access to it).
- Strive to keep only 5-7 days of inventory (at most) on hand. Any more than that is just money sitting on a shelf.
- Beware of case splitting: decide if you will use up product within a couple of weeks or it will sit on the shelf for months.
 - Did you know that when case splitting produce, it may be an item coming from the same box week after week from the produce house ...so you might save by buying the whole case. Find out how fast produce moves in and out of your supplier's inventory.
- Calculate how much you should spend each week:
 - First determine your weekly costs for dairy or milk orders.
 - Then determine your bread order. Dairy and bread orders are typically consistent from week to week.

- If you use a local produce company, determine and incorporate that cost, too.
- Multiply your total daily census by your budgeted food cost per day. Then multiply it by 7 = your total expenditure allowance per week.
- Subtract the dairy, bread, and produce (if appropriate) amounts. This will equal the total amount allowed for food purchases per week from your prime vendor.
- Also consider the budget for the following items. These should be separated when calculating food costs.
 - Supplements
 - Paper products
 - Other supplies
 - Staff meals
 - Catering
 - Other



What Else Can You Do?

- Look at usage and waste every day. Using the production system tools can help. Consider doing a waste study for a week. This will help raise waste awareness among staff.

- Look at floor supplies; use bulk. Consider a snack cart; get creative.
- Track what leaves the department for special events and catering (keep records).
- Look at snacks in long term care. You are only required to offer an HS snack (7 pm snack).
- Do not pre-pour beverages in dining rooms. Do it table side.
- Look at your service. Is it outdated (using trays)? Are you changing with the trends - such as room service or open dining?
- Scale down production, especially when census is lower than normal. Consider posting the current census in the kitchen.
- Use a spend-down sheet much like a check book.

- As invoices arrive, enter in on spend-down sheet under

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categories—food, supplements, chemicals, disposables, and other supplies.

What to Include In Each Area:

Food: Food is food. All food goes in this area, breaking it out beyond this may just be more work.

Supplements: Shakes and powders. Work with your RD to standardize your supplement policy.

Chemicals: Cleaning supplies

Disposables: Paper and plastic one-time use products

Other:

- **Employee Meals:** How many are served? Attach a dollar value to them. This can help in explaining costs.



- **Special Events:** These could be catering, activities, or other meal/food events that are not normally part of the day. These events should be documented and costed out. A helpful tip is to have the food separately invoiced for large events.

Summing It Up

Taking steps to control food costs—from ordering to production—will help managers make the most of their foodservice budgets in these trying economic times. [DM](#)

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. Contact him at (419) 663-9300 or visit www.innovaservices.info

Rules of Thumb for Purchasing

Need to know how much to order? Remember:

Typical Yields

- Cake mixes often specify portions on the box based on cuts—know how you will cut your finished product.
- Typically 10# of any vegetable will yield 40 - 4 oz. portions.
- #10 can yields 22-24 portions.

Case study: The case pack for your menu item is already portioned and counted for you...

Census: 94 Customers Menu Item: Pork Chops

- 76 Regular diets
- 10 Mechanical soft diets
- 8 Puree diets

One case of chops is 40 portions. Do you order:

- 3 cases of pork chops?
- or 2 cases plus 10# of ground pork for Ground and Puree diets?

You can use the second option and save money and time, but remember: When using leftover pork or ground pork to produce your mechanically altered diets, the flavor profile of the item served should be the same as that served for regular diets.

AP vs. EP Yield

- AP = As Purchased amount of the ingredient
- EP = Edible Portion of the ingredient

A cooked product such as a 12# ham will yield 48 portions, but a 12# pork loin raw will yield less: 36-40 portions. Why? During the cooking process you lose 12-30 percent, depending upon the amount of fat you trim and the marbling of the meat being cooked.

Other Tips

- Log in leftovers and incorporate use into the production sheet.
- Use a slicer for uniform cut and yield.
- Use a scale to weigh your reference portion, then cut all the same as the reference portion.
- Consider the case/pack size when ordering.
- Use your computer program to tell you the number of dislikes and diet mix. This is great information to share with production.
- Get creative with staff meals—think of your leftovers as an ingredient for preparing staff meals rather than giving away leftovers as is just because you have them.
- Having dessert carts for your customers is fun and a great way to use up miscellaneous desserts while saving money.
- Snacks: use previous day's leftovers, as appropriate, in planning next day snacks.
- Review historical usage. For example, if fish is on the menu, use historical data to determine how much you need to produce after accounting for allergies and food preferences.
- Take inventory. Look at what is on the shelf. Order to your par level for staples and usage needs for perishables.
- Use your recipe program and enter in the amount to scale your recipe. If you don't have an electronic recipe program, purchase one. It will be a quick ROI (return on investment).

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by Barbara Thomson, CDM, CFPP, RAC-CT

A new five-star rating system for nursing homes will make it easier for people to identify the best and brightest long-term care centers.

Catering to Opportunity

by Wayne Toczek

Seeking a way to generate some income, enhance your goodwill, and spotlight staff talent? Catering may be the answer. Follow these steps to determine if catering is right for your department.

Powered by Technology: Streamlined Foodservice Operations Deliver Dividends

by Richard Bengis, CDM, CFPP and Timothy Pierelli, CDM, CFPP

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catering *to Opportunity*

by | *Wayne Toczek*

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. Contact him at (419) 663-9300 or visit www.innovaservices.info.

Some of the content for this article came from *The Food Service Managers' Tune-Up Book*, by Tim Bauman, CDM, CFPP and Wayne Toczek. To order, send an email to tuneup@earthlink.net.

Looking for a way to break up the repetition of three meals a day: cook it up, dish it up, clean it up? Seeking an opportunity to showcase the talents of your staff? Wondering how your department can be the darling of your marketing/admissions department? If you have a meeting room that can accommodate a dozen or more and some creative thinking, developing an external catering program may just be the way to put your department and your facility in a positive spotlight. Here are some steps to follow when determining if a catering program is right for you.

Plan ahead to the last detail, deliver excellent product and presentation on time, follow-up with your customer, and tout your success and contribution to your direct report. Catering can be an exciting—and profitable—addition to your foodservice program.

STEP

1

Explore the feasibility

- Evaluate your in-house talent. Do you and your staff have the skills needed to deliver food and service that will enhance the reputation of your facility?
- Inventory your equipment and display ware. Will you need to purchase large or small equipment to provide your service? If yes, how much will you need to invest to get started?
- How can your prime vendor support your program?
- Identify your target customers—consider the size of your room, what your customer can bring to your organization—think, Chamber of Commerce, Rotary Club, Kiwanis, or other civic organizations in your community.
- Discuss the possibilities with your direct report. What benefits will your program bring to the facility? How will revenue be adjusted against spending on your budget?

STEP

2

Develop the framework for your catering program

- Start with a menu and items list. What services require 24 hours notice? 48 hours notice? A week or more?
- Develop a pricing structure for your services. Include cost of food, supplies, labor (including taxes and benefits—usually 25-35 percent), rental equipment, and room rental fee (if desired by your facility). Round up—for example, if you are serving chicken breasts packed 24/case to 20 guests, charge for the entire case. Also include the cost of condiments in the price of menu items.
- Determine what equipment you will buy and charge back to events over time. Also decide what equipment you will rent and charge directly to the event.
- Determine a “shop supplies” charge, just as your mechanic does. This would include the cost of items that are not easily identifiable to the customer, but are very real costs for every event—chemicals used in clean up, pan liners used in production, spices, foil, film, etc. Translate this information to a percentage of event costs—perhaps 5 percent, 7 percent, or 10 percent—and use for every event.
- Set up the procedure for coordinating event ordering for room and food. Will you use the computer or a paper form? Whose approval is required to book an event? How



will billing be handled—and will you require advance payment for any services? Who will book the room?

- Set up specific procedures and a form providing all information.
- Be sure to include a cancellation policy.

STEP

3

Get the word out

- Consider speaking at a Chamber of Commerce meeting or sending an e-mail to members.
- Add sample menus to your facility's website as a PDF or Word document that can be downloaded.
- Draft a confirmation letter.
- Take photos of your events for future marketing or post positive comments.
- Invite the local paper, post flyers on bulletin boards, contact leaders of your target customer groups.
- Offer an incentive for customer referral... a tray of cookies, perhaps.



STEP

4

Make it worthwhile


- Keep good records. Make sure your events are profitable or at least recovering all costs if that is the philosophy of your facility.
- Review and update your pricing annually.
- Solicit feedback. Follow-up with customers and use comments to improve your program.
- Know your limits. Assess the talent of your staff and be realistic about the number and frequency of events that you can deliver with excellence. It takes a long time to recover from a poor performance.

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Tips to Add Pizzazz to Your Catering Events Without Breaking Your Budget

Here are two dozen tips from *The Food Service Managers' Tune-up Book*, by Tim Bauman and Wayne Toczek, that will help you add “pop” to your events.

1. Search secondhand shops for trays and platters. They don't have to match, but they must be made of material that can be sanitized.
2. Look for swatches of cloth in all sorts of colors. Fabrics are great to “crumble up” on the table and cover layers of your table.
3. Use a variety of boxes to create different levels. Height adds interest and excitement to the table.
4. Ceramic tile and marble slabs are great to use and available at any home improvement store.
5. Need a nice carving board? Look for a round wooden table top that is brand new, available at most home improvement stores. (Typically they are in the craft area where they sell table legs and do-it-yourself shelving.)
6. Purchase a portable NSF-approved burner and a non-stick pan for a quick action station (keep a fire extinguisher nearby).
7. Landscaping blocks make nice tray stands and add levels. Purchase them new and then run them through the dish machine to make sure they are clean.
8. Christmas lights are great to use to decorate a table. Position the cord so your customers do not trip.
9. Glass blocks make nice table décor and can be found at home improvement stores.
10. Wire chafing dishes can be dressed up by draping with colored material. Avoid placement by the stereo area.
11. Baskets make great utensil holders. Purchase at local craft or home décor stores and line with cloth napkins.
12. Use a round angel food cake pan filled with ice and sliced oranges and lemons to create a fancy ice ring for any punch.
13. Take dipping chocolate to a new level. Use wooden skewers as the dipping utensil for items such as marshmallows, rice crispy treats, strawberries, pineapple chunks, bananas, and other fruit.
14. Red cabbage leaves make a nice underliner for fruit displays. Purchase a couple of garnishing books for other great ideas.
15. Think of customer flow when setting up a table to ensure a smooth traffic pattern. Consider the scatter system, using stations to keep the crowd moving.
16. Use small fancy picture frames to hold cards which identify foods. Make sure the penmanship is good or print from the computer.
17. Use circulating fans for outside functions to blow on certain displays. The light breeze keeps flying pests away.
18. Glass mirror tiles make great trays for food items and as level tops for different sections. Manage the smears to keep them sparkling.
19. Look for décor that matches your function. For example, if you are catering an Asian event, consider using a wok display and even a bamboo bind to cover a table instead of a tablecloth.
20. Make up space when using ice with larger ice chunks. They last longer and compensate for melt off water and dripping.
21. Think about where utensils will be set when not used. Four-inch decorative tiles make both functional and attractive spoonrests.
22. Make functional centerpieces, such as bread rings that are simply done in a bunt pan. Place a nice champagne glass in the center.
23. Think about the uniform. Always have some nice chef coats and black aprons ready for staff use.
24. Make desserts smaller and place a variety on the plate. This will allow for a sample of each and there will be something to please everyone. 

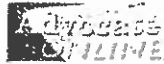
BONUS TIP

Action stations with a person creating can be exciting for the customer and may not require any additional cost. Action stations might include: stir fry, quesadillas or fajitas, sandwich samples, grilling—indoors or out, tossing salads, making wraps, carving meat, or creating Bananas Foster. The list is limited only by your imagination.

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Food Consultant speaks at luncheon

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Katherine Obringer
Staff Writer

GREENVILLE - Occasionally the Brethren Retirement Community holds a special luncheon open to the public for a nominal fee.

Tuesday was just one of those occasions with the "Crave" luncheon. The meal consisted of a salad in an avocado/flour tortilla wrap, fresh green beans, rice, and a pecan glazed skinless chicken breast. Then there were the strawberry-banana smoothies. And there was fresh pineapple, chocolate dipped strawberries, lemon luciousnesses, and hand made chocolates. All of which was served by members of the BRC staff.

The guest speaker was Wayne Toczek of Innovations Services. He is a noted author and an associate member of the Food Service Consultants Society International. His goal is to get people who are constantly on the run to think about what they are eating and to eat healthier. Healthy food choices, like choosing fruit instead of chips. Smaller portions such as 3-4 ounces of meat instead of 8-12. Not being afraid to ask what the ingredients are in something is another big thing for people.

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Ahead of the Curve: CCRCs

Making senior dining outstanding starts with changes big and small.

Beyond bricks and mortar, customer service and food will be the competitive edge needed to set CCRCs apart from their competitors in the future. While regulations and cost will remain a concern, one owner-operator I work with said it best recently: "Keep it simple and make it satisfying to the customer and the rest will take care of itself." At the same time, achieving that customer satisfaction is more demanding today than ever before. Consider these issues:

- Many CCRCs compete with restaurants, raising the bar even higher. In many facilities, residents have the option of going out to eat or staying in. You've got to provide a higher perceived value to compete.
- Too often, the dining department of a CCRC is seen as a liability and not a profit center. You have to demonstrate that investing in the department can make it both a

midday hydration carts. As senior dining continues to evolve, we'll start to see staff dressed more like chefs and less like surgeons from the 1960s.

Making Changes, Seeing Solutions

Translating such strategic objectives into day-to-day CCRC foodservice management is never easy. A philosophy I have always tried to use is: "It's not what you can't do, it's what you can do that matters." Let's see how that insight might work in practice.

For example, if a diabetic resident can't have a full piece of pie, why not give her a twelfth of the pie instead of the standard eighth? It might be more satisfying than an artificial option. Extra effort and

Customer service and food will be the edge needed to set CCRCs apart in this highly competitive market.

marketing advantage for the organization and a profit center.

• A CCRC's customer base is being targeted by offsite alternatives all the time. Your marketing efforts need the same impact and creativity. Just reprinting last year's flyers will not cut it anymore.

• The "Meatloaf Monday" stereotype about bland, repetitive CCRC food is still a problem, but the tide is turning. We are seeing more food cooked-to-order. And we are seeing innovations: 24-hour kitchens, family-style dining, brunch or continental breakfast options, and intriguing

investigation is needed to find the best-tasting sugar substitutes.

Sometimes restrictive diets are just plain bland. When green beans are cooked without bacon, they not only get healthier; they also lose that familiar, home-spun flavor. Again, extra effort on the part of managers and chefs can find ways to make food both healthy and delicious.

Little things in senior dining can make a big difference. Would you rather have a salt and pepper shaker like you used to have at home, or tiny packets that are near-impossible to open? How about real china



Toczec's books address aspects of dining and customer service that are often overlooked.

instead of plastic?

Of course, bigger things make a difference, too. Being able to decide what to eat just before eating is huge for seniors, giving them back some control.

Other changes include 24-hour kitchens, family-style dining, brunch or continental breakfast options.

Finding new ways to make hundreds of small changes like these can be a challenge, but can be the deciding factor in providing the outstanding care that will differentiate CCRCs in this highly competitive market. Taking the easy road will never be enough to make the difference. Remember: "It's not what you can't do, it's what you can do that matters."

Wayne Toczec is founder and CEO of Innovations Services, a consulting and training company in the dining services industry. Based in Norwalk, OH, Toczec is the author of books on customer service, including *The Customer's Experience* and *The Dining Experience*. For more information, visit www.innovationservices.info





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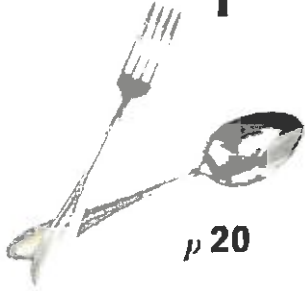
Changing Times
In the Dietary Department

Budgeting Strategies
For an Improved Bottom Line

DMA



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Features

Person-Centered Dining: Innovations in Dietary Services

by James H. Collins, PhD

Person-centered care is a refreshing philosophy that places the long-term resident at the center of the care process. It's replacing the traditional medical model of care.

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The Times They Are a-Changing

by Laura Vasilion

With Baby Boomers pushing 60 years old, foodservice trends are changing...and for the better.

24

Dietary Managers Must Think Outside the Box

by Debra A. Rogers, CDM, CFPP

Dietary managers must be active participants in the plan of care for each resident as well as the Quality Improvement process in order to run a successful department.

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Budgeting Strategies for Your Foodservice Department

by Wayne Toczek

New fiscal year? Resolve to achieve department goals while staying fiscally responsible. Building a realistic budget is easier when you follow the guidelines outlined in this article.

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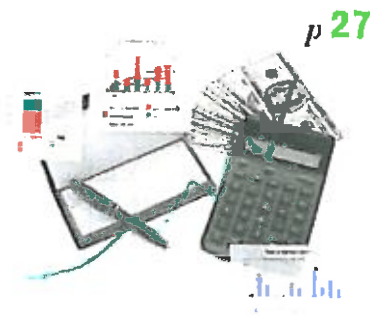
DMA: 2007-2008 Year In Review

by Vicky Kearney, CDM, CFPP

Here's our annual look at programs and initiatives launched in the last fiscal year. The list is varied and impressive.

Also in This Issue

p 35 DMA 2008 Salary & Benefits Survey





Budgeting Strategies

for your Foodservice Department

by | Hayne Toczek

Achieving your department goals while staying within budget depends on setting realistic goals and understanding how funds are allocated. It also requires flexibility.

Understanding how the budget was built is key to making it work. Most budgets are reasonable or have some type of historical basis. Knowing how it was built takes on even more importance if you need to prove that the budget you have is not consistent with the resources required to meet established goals.

(Continued on page 28)

Not understanding the numbers often results in a staff response of, "It's not in our budget," to requests made by residents, family members, and other departments. This type of response spreads throughout the community and can have a lasting impact on how customers' families and future residents feel about the ability of your operation to provide quality services. Developing a zero-based budget gives you the information you need to manage the dollars allocated to your department. This is best done at the beginning of the budgeting process. If you inherited a budget that seemingly has no rhyme or reason, choose not to be a victim of your budget. Instead, do a zero-based budget for your department so you will know the dollars required to achieve department goals. You can then have informed discussions with your supervisor about additional resources needed or actions that might have to be postponed. The following information is required for developing or analyzing your budget:

- Customer count/census by care level (acuity)
- Menu
- Production specifications
- Current prime vendor price list or purchasing group vendors
- Supplement use

- Retail or revenue services
- Staff skill assessment
- Equipment available
- Types of service offered
- Assistance provided by other departments during meal service
- Clean-up process
- Any additional components specific to your facility

With this information you can cost, based on your menu, other expenses in retail and extend it to a total annual food budget. Similarly, determine the labor—number of cooks, etc.—needed to produce, serve, and clean-up. Now that you know your base costs, ask yourself some questions about each of the categories:

Menu—Is there enough variety? How do customers select their meals? Is there another way that would offer better service without increasing production costs? Do you have recipes for every menu item? Do you have production sheets and use them correctly?

Product specifications—Are you using brand and generic products appropriately? Could you use brand name products when the customer will see the label, and use comparable quality house brand products when the label is not seen (name brand soda vs. Grade A Fancy green beans)? Do a self check—if you have several brands of the same product on your shelves it's a good indicator that you are "cherry picking" based on price, not using specs based on quality needed to produce the end product desired. Do you participate in a buying group? If yes, do you maximize its potential by full participation? If not, are there opportunities available? (Request a review or a 6 month velocity report from your purchasing group.) Are you taking advantage of drop incentives? Payment incentives? Are the "deal" items being purchased from your purchase group?

Skill assessment—Does your staff have the skills needed to scratch produce the items on your menu? If convenience preparation is needed to compensate for inadequate staff skills, is the cook's salary that required for a cook—or for a person who finishes an already prepared product? Were staffing requirements adjusted when the change to convenience was made? (i.e. You still have a baker, but all desserts have been purchased ready-made for years.) Is staff well trained? Food cost is as much the result of what happens to it after it comes through the door as what it costs to purchase it.

Equipment availability—Are critical pieces of equipment in poor repair resulting in hours of overtime and/or menu substitutions, poor yield, or use of higher cost convenience items?

Staffing—Do you have enough employees to cover your staffing plan? Do other departments provide the agreed-

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upon assistance? Does your staff incur mindless overtime, i.e. early clock-in or late clock-out?

Measurement—Do you have a system in place to measure performance to budget by category each month? Does your staff understand the budget as appropriate to their role? Does everyone practice portion control? Do you have the equipment for correct portion control (scales, scoops, and measuring supplies)?

Revenue—Do you measure sales? If so, how? By check average or by total sales? Are the prices realistic or are you providing subsidizing for meals? As for catering opportunities, are they being reviewed and explained in variances?

Now that you understand the budget, use your understanding as a framework to discuss the needs of your department with your supervisor—"If I had more money in the budget, we would be able to..." Include requirements for implementing processes, services, or systems that are not currently in place—a new oven, new meal delivery system, or justification for purchasing group fees based on the overall benefit to the organization. Throwing more money at a broken system will not fix it. Have a plan associated with results for every dollar you request. Can you increase

Focus on the best possible use of the resources that you have

to provide the best possible experience for your customers, their families, and your community.

revenue with café sales, catering, or other events that can justify adjustments if needed or increased supplies?

Use plate waste, recording and discussing leftovers, meal rounds, weight loss reports, and customer comments as opportunities for self examination in which you seek clues to providing increasingly better food and service to your customers. It becomes a matter of perception. Instead of complaining about what you *don't* have, focus on the best possible use of the resources that you *do* have to provide the best possible experience for your customers, their families, and your community. ■

Wayne Toczek is CEO of Innovations Services, www.innovationservices.info. He is author of "The Dining Experience" and "Customer Service." He can be reached at toczekw@earthlink.net or (419) 663-9300.



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noun

1. the quality or state of being outstanding and superior
2. (in healthcare): a state achieved by implementing the VST system
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Features

It's Not Easy Being Green: Growing Trends for Sustainability

by Colleen Zenk, MS, CDM, CFPP

Current methods of food production and transport are taking a toll on our planet, so food buyers are re-thinking how and what they buy. This article sorts through the "going green" lingo and defines what the buzz words really mean.

17

Using Word-of-Mouth or "Buzz" to Market Your Food Service

by Sue Crossbauer, RD

The comments and experiences of others have a big impact on the choices people make. Use word-of-mouth and other people-oriented approaches to convey a positivemarketing message to your customers and prospects.

21

Safe Dining for Susceptible Customers, and Top 12 Unsafe Food Handling Areas

by Linda Handy, MS, RD and Wayne Toczek, BS

The regulatory climate for food safety just got tougher. New interpretive guidance for surveyors and other changes make it even more critical for dietary managers to focus on safety standards and preventing food-borne illness.

26

Becoming a New Leader: Hold on, It May Get a Little Bumpy

by Christy B. Knowles, PIIR

New leaders would benefit from a pre-flight safety message, like those provided on planes.

30

e-Learning Offers Flexible Staff Training

by Jill Arroyo, MS

Dietary managers and their staff are benefiting from the flexibility and convenience that e-learning offers. Find out more about today's new technologies for education and training in this article.





by | Linda Handy, MS, RD and Wayne Toczek, BS

Ask dietary managers about their worst nightmare and you will get some to fess up that it is the FBI. Huh? You know, FBI, foodborne illness resulting in susceptible customers getting sick on their watch. Or perhaps the nightmare is when the dietary manager did *not* “watch,” so their customers became sick. It is one thing to have a contaminated product—like spinach—delivered to you, but it is something else when *you* failed to ensure that the food was safely handled in your kitchen.

If you think the past regulatory climate for inspecting food safety has been tough, you should gear up for an even tougher process. You could say it's a zero tolerance for potential FBI practices. The regulation (Federal OBRA F 371) has not changed; it is still a requirement that food will be stored, prepared, and served safely.

What *has* changed? Three things:

1. New interpretive guidance for surveyors: Extensively revised based on the current Food Code, as a standard of practice
2. New detailed Surveyor Investigative Protocol for Kitchen Observation
3. New detailed guidance on scope and severity, including when to call Immediate Jeopardy for unsafe food handling

Whenever there is more surveyor training, there is a heightened climate of ensuring compliance (more look, more see, more deficiency write-ups). Do what the surveyors are doing: get more training and study the current

(Continued on page 22)

Food Code and new interpretive guidance. (See end of article for CMS website address to access current regulations and guidance.)

Take a SEC and consider the Three Steps to Success in Safe Food Handling: Standards, Educate, Check (SEC):

1. **Standards:** Revise Policies and Procedures (P&P) to be current with Food Code and regulatory requirements.
2. **Educate:** Be sure every staff person knows and understands how to follow your P&P.
3. **Check:** Be sure every staff person does what your P&P says and what you have trained.

Read the story of an Immediate Jeopardy situation (below) that was called for unsafe food handling in a healthcare kitchen. This is a true story. You won't want it to happen in your facility.

Immediate Jeopardy—What Is It?

What is an Immediate Jeopardy situation? It must meet three criteria:

1. **Harm:** Could it cause harm or potential for harm?
2. **Immediacy:** Is it likely to occur in the near future if immediate action is not taken?
3. **Culpability:** Did or should the facility staff have known about the danger/situation, prior to the surveyor's identification of a problem?

(See CMS website reference for accessing Appendix Q, Guidance to Surveyors on Immediate Jeopardy.)

Francis Bacon was quoted as saying "Knowledge is power." The more your staff knows, the safer your food will be when served to your susceptible population. Food safety cannot be hurried or briefly touched on. To have safe food, a manager must demand attention and eliminate potential problems.



A Story of Immediate Jeopardy

The surveyor observed and tested the temperatures of several large turkeys in the walk-in refrigerator. They were in the warm danger zone of rapid bacterial growth 20 hours after they had been cooking and put to cool. After interviewing the cook, dietary manager, and consulting dietitian, the surveyor determined that there had not been sufficient training or monitoring of staff practices and lack of staff knowledge. The survey team gathered, reviewed all the information, and decided to call an Immediate Jeopardy (U). The two tags were F 371 Safe Food Handling, and F 361 for inadequate dietary consulting by the dietitian to the dietary manager and staff in food service. The next two stressful days were filled with policy revisions, training of every staff member, and development of a detailed monitoring tool for safe food handling, while the surveyor observed and monitored the progress. The dietitian's contracted hours and consulting to dietary services (for policy revision, staff training, and sanitation checks) was increased. The facility had to demonstrate and show evidence that safe food handling practices were now in place. Finally, the U was abated. It had cost the facility civil money penalties for each day of U, but the greater cost was in loss of confidence and a negative public record for dietary services and the facility at large.



(And Tips on How to Avoid Them)

1 **Cross contamination, gloves, and hand washing:** A poster is great to have up, but observe (have staff demonstrate) correct hand washing. **RULE:** Before handling food, always wash hands. Use gloves **ONLY** for handling "ready to eat" foods.

2 **Sanitizing bucket system:** Establish fill guidelines, specific change times, soak all cleaning cloths, and check periodically for effective chemical concentration. Simplify the process: A.M. Cook turns on the equipment, takes temps, and fills the sanitizer buckets (suggest a slightly higher concentration to last longer). P.M. Cook refills...now you have accountable staff and one less worry.

3 **Garbage cans:** Cans should be unlidded during "continuous use" per the Food Code. Simply connect lids to the can (this eliminates lids being tossed like Frisbees in the parking lot). Evaluate number of cans actually needed.

4 **Diswashing:**
For high-temp dishmachines: Check and log manifold gauge for 180 degrees F and periodically check (for clogging) the rack level temperature for 160 degrees F. Use a paper thermometer or holding thermometer.

For low-temp dishmachines: Check and log for 50 ppm chlorine. (Logs demonstrate monitoring and can prove that all dishes were sanitized up to a certain point.)

For manual sanitizing (pots): Ensure effective sanitizing concentration and time exposure (usually 1 minute), read sanitizer label.

For dish drying efficiency: A process of rack—wash—stack versus peg rack—wash—off peg rack into bin (which decreases drying ability or stacked on "unclean" mess matting, almost "glued" to tray). Consider tilting hang shelves for drying and storing (the Food Code allows no towel drying). Consult your chemical rep for resources and shelving or wall accessories to aid in correct drying.

5 **Thawing:** Routinely put delivered frozen meats in walk-in refrigerator to thaw; use within seven days (if ordered to match menu needs correctly). This reduces lists and pull time. Ensure safe storage on bottom shelves, without contaminating ready-to-eat foods. Follow the Food Code for the three acceptable thawing methods. Sanitize sinks after thawing (any prep) of potentially hazardous foods (PHF).

6 **Cooking to appropriate internal temperature:** Ensure cooks take temperature of all PHF; follow standards in Food Code (i.e. poultry to 165 degrees F, ground meat to 155 degrees F).

7 **Fast, safe cool down of potentially hazardous foods (meats cooked ahead and leftovers):** Cool quicker by transferring to a frozen container, put in freezer for first two hours, or consider cutting meat into smaller pieces before you cook it. Ensure staff follows standards of practice (per Food Code) for taking PHF safely through "warm danger zone of rapid bacterial growth."

8 **Reheat to 165 degrees F:** All cold hold foods. Consider increasing use of microwaves for reheat of "comfort" foods/foods brought from outside and held in resident refrigerators (nursing may need training on thermometer use). Watch buffet holding times for reheat (after two hours).

9 **Safe handling of foods by other staff, such as Activities, Nursing:** Dietary managers should assist in reviewing the policies and training of non-dietary staff to ensure there's no bare hand contact with ready-to-eat foods (use gloves or consider "donut" tissues for handling), and review their refrigerator guidelines for temps, cleaning, date marking, and food discard.

10 **Action alert on ice machine:** There's more to the ice machine than just the bin and scoop. Ensure maintenance staff or contracted service follows manufacturer's guidance for internal components: Using ice machine cleaner (for algae, slime, mineral build up) and sanitizer (at appropriate concentrations to kill bacteria and viruses). The Food Code states every six months.

11 **Safe egg handling:** Use pasteurized shell eggs for undercooked/soft eggs. Date mark and follow manufacturer's guidance on thaw/quick use of low cholesterol egg products (comes frozen/no use-by date).

12 **Employee health:** Ensure specific policies and training on what is reported (any exposure to Hepatitis A, travel, symptoms), working restrictions in the food area, release from doctor to return to food preparation. (Follow standards of practice in Chapter 2 of the Food Code.)

(Continued on page 24)

Other Food Safety Considerations

Prepare for Local County Health Department CCP (Critical Control Point) Inspections: They may track your food from purchase to preparation to customer. Ensure that you follow the standards of practice for safe food handling per the Food Code when receiving food (maintaining correct temperature), storing, thawing, cooking (recipe guidelines), reheating, and disposing.

Streamline Equipment (less to clean and to store): Clean out drawers and part with under-used and unnecessary items (damaged spatula, mercury thermometer), and toss old carts.

Follow Standards: Albert Einstein was asked why—if he was so smart—he could not even recall his phone number. His response was, "If I need it, I can look it up." Do you have the standards of practice (current Food Code) as a ready reference to look up? Is your policy and procedure manual revised, and does it reflect the language and intent of these standards?

NEW

Resource Available on Food Safety Training

DMA has just released a new Master Track title designed to help managers train their staff in food protection practices. "Teaching Food Safety to Your Staff" is now available and can be ordered from the DMA website by visiting www.DMAonline.org/market or call (800) 323-1908.

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Survey Changes

For several years, the Centers for Medicare & Medicaid Services (CMS) has had a project underway to convene "expert" panels to improve the guidance to surveyors in key Tags in the State Operations Manual (SOM), Appendix PP. Their charge:

1. Revise the interpretive guidance.
2. Develop new Surveyor Investigative Protocol (first time ever: Kitchen Observation Protocol).
3. Provide specific severity guidance for determining the correct level.
4. Define example of severity, including immediate jeopardy.

Recent Tags revised:

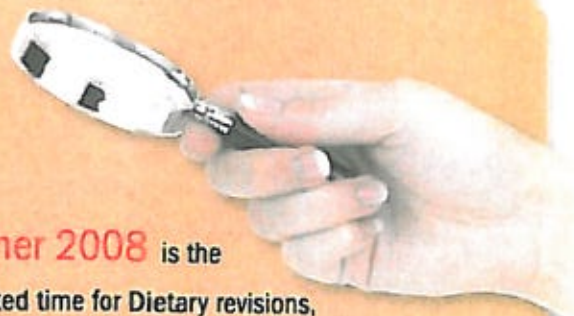
1. (2004) Pressure Ulcers
2. (2006): Activities
3. (2007) Pharmacy

Currently, it's anticipated that summer 2008 will be the time for Dietary revisions, with F 371 Safe Food Handling and F 325 Nutrition Tag changes.

Who participated in the CMS workgroups on F 372—and what did they do?

NAME

No



Summer 2008 is the anticipated time for Dietary revisions, with F 371 Safe Food Handling and F 325 Nutrition Tag changes.

1. The first workgroup included representation from the Food and Drug Administration (Glenda Lewis, MSPH), Centers for Disease Control and Prevention, Centers for Medicare & Medicaid, academia, and a California specialty surveyor (Linda Handy, MS, RD). The group was charged with developing the first revision draft, which was sent out for public comment in July 2006.
2. Next came categorized public comments (there were 850 individual or "group" comments for F 371).
3. The second workgroup was made up of CMS dietitians and a specialty surveyor (Linda Handy, RD), which made changes and reworked the revisions. (The final draft was completed in fall 2007.)

The more your staff knows, the safer your food will be when served to your susceptible population. Food safety cannot be hurried or briefly touched on. To have safe food, a manager must demand attention and eliminate potential problems.

Effective Systems: Establish opening and closing task lists, and make it mandatory to "clean as you go." Reinforce production routines with proper time frames and sufficient time to perform tasks correctly, stress efficient ordering (time frames, pull and thaw).

Monitor and Reward Staff Performance: Establish routine sanitation audits (not just before a survey), and acknowledge excellence with simple rewards or certificates for "brag" board.

Finally, as managers we must ask ourselves:

- Doesn't my staff *want* to do a good job of safe food handling?
- Does most of my staff know *how* to do a good job of safe food handling?
- Have I given them the training and tools to safely handle food?
- Am I leading by example and "practicing what I preach, not breach"?
- Is staff well trained in safe food handling habits—even when no one is looking?

May your dining service for susceptible customers be safe, and may your surveys go well. ■

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References

This article includes excerpts from the new book "Safe Dining for the Susceptible Customer: 7 Professional Views During Survey"

To access CMS Regulations and Surveyor Guidance: www.cms.hhs.gov

To access the current Food Code: Google "FDA Food Code 2005" or visit www.cfsan.fda.gov->Food Code-> Table of Contents, click on pdf for each chapter

More On "Safe Food Handling" At DMA Annual Meeting



Glenda Lewis, MSPH of the Food and Drug Administration, who was involved in a CMS workgroup, will be back by popular demand as a presenter at the DMA Annual Meeting in Philadelphia this summer. Lewis's presentation is titled "Update: New From the FDA," and on July 31 she will discuss what's new in the FDA Food Code Supplement and how it affects your facility sanitation practices. Gain details, answers, and advice—straight from an FDA expert! Lewis works as a supervisor of the Retail Food Protection Team.

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Professional success involves some risk-taking. Guidelines provided here can help you take smart risks—and improve your chances for positive results.

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Seeking management or nutrition information on a specific topic? Perhaps we addressed it in DIETARY MANAGER last year. Provided here is a summary of feature articles that ran in our pages in 2007.

Online Article: "What is Metabolic Syndrome?"

by Sue Grossbauer, RD

How common is metabolic syndrome? What are the risk factors? Do lifestyle choices make a difference? What's the real carb connection?



Go to www.DMAonline.org/CE to access our online continuing education article.

Regulation

What You Can Do— Not What You *Can't* Do

Senior continuing care is one of the most regulated industries in the country. How we choose to comply with these regulations will make an enormous difference in how our customers, the residents who live in senior care facilities, and those who own and manage those facilities, feel about the service they receive.

by | Wayne Toczek

With the threat of funding cuts being the norm and financial penalties for non-compliance ever more frequent, owners and managers are tempted to take the service route that seems to have the least risk. On the surface, this makes sense. But when you look at the broader picture, does it really make sense to stop serving hot dogs because you are afraid the resident might choke? The hot dog is an American food icon. Wouldn't it better serve those living in our facilities if we looked at all of the resources available to us and tap into those sometimes hidden employees in dining and environmental services, so we have extra eyes to assist in monitoring the meal? With a minimal training investment, service workers are now part of the resident care team. A hidden benefit is these employees will be much less apt to take a shortcut that would negatively impact service next time.

The process of balancing risk and cutting-edge service begins with understanding the regulation, its intent and the outcome desired. Regulations are in place because of facilities that are not meeting service requirements. "Progress and innovation in the dining service program should not suffer because of the regulations or even budget constraints," says Oliver Walker, Vice President of Operations, Covenant Retirement Communities.

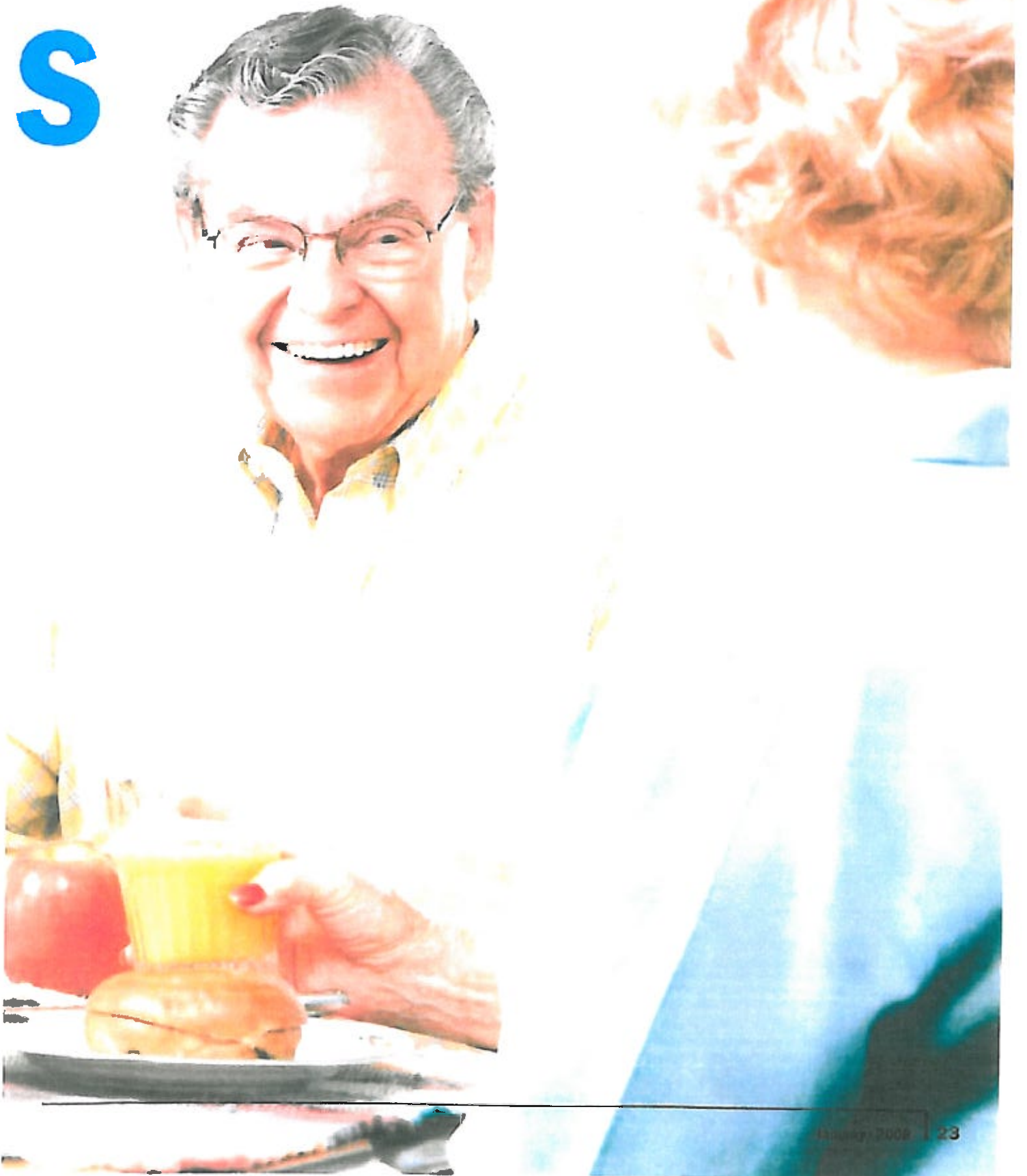
Service and food quality enhancements improve resident satisfaction survey results and marketing possibilities. Sometimes, it's just a matter of boiling the regulation down to a simple solution geared to meet the needs of the resident, not a complicated system to meet the requirements of the regulation.

Regulations require resident care facilities to have a planned menu, to post that menu and, in most cases, to offer the menu appropriately modified to meet diets prescribed by the physician. This is where resident dissatisfaction often begins—they have been making food choices without fear of the "food police" showing up, then circumstances require that they move into a senior facility where meals

(Continued on page 24)



S



are planned for them. Regulations that require that diets be modified do not say how strict the modification needs to be. In fact, the American Dietetic Association takes the position that a very liberal interpretation should be used for seniors living in a medically managed environment. Would you rather have a piece of pie like that served to everyone else at your table, or would you think having a carbohydrate-controlled fruit is the perfect substitute? Quality of life is important to the management of many disease states, so why not serve a smaller portion of the pie to residents who have diabetes?

Food cold? Serving meals on time a problem? Are you going to hire another dining services employee or totally rethink the way you are providing service? You can add an employee to speed up the process. You can buy another new heat support system. Or, you can take a step outside the boundaries of traditional thinking—the way everyone else is doing it—and re-invent the way you provide service. How about getting tray assembly out of the kitchen? Better yet, how about getting rid of tray service altogether except for those for whom it is medically necessary?

Wouldn't point of service meal assembly feel more like home? Food delivered in bulk to the area where the resi-

dents eat, dished up and handed to them along with the beverage they have just chosen is much more like the way they have eaten all their life. There is no trayline going on in the kitchen, so dining services staff members are available to assist with meal service at a place where they can see the resident as a person.

When completing your purchasing specifications, think quality first. Which product best matches the needs of your menu, recipes, and flavor expectations of your customers? You may save money by purchasing a higher quality, more expensive as-purchased product. Yield and resident satisfaction may far outweigh the few cents difference between the right product and the least expensive product. David Hennis, owner of Hennis Care Centers of Ohio, says "Keep it simple and make it satisfying to the customer. The regulations and cost will take care of themselves."

What time do you get up in the morning? What time would you like to get up when you retire? Imagine this—you are living in your own home, arising at 8:30 a.m. because it matches your sleep needs and your love of late night television...and then you move to a retirement community where they serve breakfast at 7:00 a.m.—"State regulations," says the dining services manager, "and by the way, supper is at 5:00 p.m., state regulations." Regulations do not say what time meals must be served. They say that no more than 14 hours can elapse between the evening meal and breakfast the next day, unless a substantial evening snack is offered to all residents. "Offered" is the key word; the resident has the right to refuse the snack. Such services as continental breakfasts and snack carts provide an additional service opportunity and, with a little planning, enable you to meet the time between meals requirement.

Weight loss problems at your facility? Think food before supplements. Though traditional supplements have their place, real food offers more opportunities to increase calorie and protein consumption. Fortify the food items selected, offer an additional snack, use molds and pastry bags to present pureed foods that look like they did before they were pureed, or add food items, such as fruit bowls and finger sandwiches, to the afternoon hydration cart. What is the person offering these items wearing? Something that looks like they just came out of the operating room, or a restaurant style uniform? The answer will make a difference in the perception of the food being served.

Viewing the regulations as a challenge and testing the waters with innovative approaches to producing food and serving your customers will be one of the decisive factors in making your community stand above others in an ever more competitive marketplace. ■

Wayne Toczek is CEO of Innovations Services, Norwalk, OH. Contact him at (419) 663-9300 or visit: www.innovaservices.info.

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