

First Choice Purchasing System Workshop Evaluation

2005

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Building the Future Through Child Nutrition

The National Food Service Management Institute (NFSMI) was authorized by Congress in 1989 and established in 1990 at The University of Mississippi in Oxford. The Institute operates under a grant agreement with the United States Department of Agriculture, Food and Nutrition Service.

PURPOSE

The purpose of NFSMI is to improve the operation of Child Nutrition Programs through research, education and training, and information dissemination. The Administrative Offices and Divisions of Technology Transfer and Education and Training are located in Oxford. The Division of Applied Research is located at The University of Southern Mississippi in Hattiesburg.

MISSION

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

VISION

The vision of the NFSMI is to be the leader in providing education, research, and resources to promote excellence in Child Nutrition Programs.

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FIRST CHOICE PROCUREMENT WORKSHOP EVALUATION

EXECUTIVE SUMMARY

As part of the National Food Service Management Institute's (NFSMI) continuous improvement process for products and services, the Applied Research Division (ARD) initially conducted an evaluation of the First Choice Procurement Workshop in 2001. NFSMI subsequently revised the workshop content and format in 2002, and ARD conducted a follow-up evaluation in 2004.

NFSMI ARD conducted a review of training evaluation literature in 2003 that identified the Kirkpatrick Model as the most comprehensive and most used model for evaluation of training programs. As a result, the Applied Research Division recommended using the Kirkpatrick Model for evaluation of NFSMI training workshops.

The 2004 evaluation of the First Choice Procurement Workshop was based on the Kirkpatrick Model. Level I, a reaction to training, was measured by a rating sheet completed by participants at the close of workshops. Level II, evaluation of knowledge, was not used. Level III, change in behavior as a result of knowledge gained, and Level IV, business results from implementation of knowledge gained by the participants attending the workshop, were incorporated into a mail survey and sent to participants 12-18 months following participation in a workshop.

Results of the reaction phase of the evaluation (Kirkpatrick Model Level I) showed participants were very satisfied with the overall workshop. Of those evaluating the workshops, 97% of the participants rated the overall workshop and program materials as either excellent or above average.

Surveys were mailed to 87 participants; 31 (38%) were returned. Survey results indicate that as a result of attending the First Choice Procurement Workshop, 25 participants made changes in their operation, while 6 made no changes. Of the 25 making changes, the change made most frequently was having more open discussion with vendors, followed by developing more complete purchasing specifications. The majority of the participants also reported that food cost, plate cost, inventory cost, and time spent on purchasing either decreased or stayed the same.

FIRST CHOICE PROCUREMENT WORKSHOP EVALUATION

In 2001, The National Food Service Management Institute (NFSMI) conducted its first evaluation to measure the effectiveness of training. That evaluation assessed the operational impact of the First Choice Procurement Workshop. In 2002 the workshop content and training manual were revised. To continue the evaluation efforts for continuous improvement and to ensure that NFSMI was meeting the course objectives for the First Choice Procurement Workshop, the Applied Research Division (ARD) conducted a follow-up evaluation in 2004.

Two sets of objectives have been developed by NFSMI for this course, operational and learning objectives. The operational objectives for the course were that a result of attending this workshop, participants will have the opportunity to:

- Review all steps in the purchasing process to assess its impact on the quality of meals served.
- Work toward adopting the open attitude toward purchasing practices that is essential to the operation of a successful Child Nutrition Program.
- Explore new approaches to facilitate a relationship with suppliers that incorporate loyalty and trust.
- Assess purchasing decisions with regard to the impact on the individual school site and quality of the meals served.
- Determine guidelines, in forming teams made up of central administrators and school-site managers, for working toward improved food service.
- Develop methods of designing specific systems for the purchasing process.

Learning objectives developed for each of the fourteen chapters of the *First Choice: A Purchasing Systems Manual for School Food Service*, 2nd Edition, are shown in Appendix A. The learning objectives identify what each participant should be able to do upon the completion of each chapter.

NFSMI ARD's 2003 review of training evaluation literature identified the Kirkpatrick Model as the most comprehensive and most-often used model for evaluation of training programs. As a result, ARD recommended the Kirkpatrick Model as the basis for evaluation of training workshops. The model is composed of four levels:

- Level I measures how participants feel about the various aspects of a training program including topic, speaker, schedule, and comfort of the training environment. Reaction is basically a measure of customer satisfaction.
- Level II is an assessment of knowledge acquired, skills improved, or attitude changed due to training.
- Level III measures the extent to which participants change their on-the-job behavior because of training. This is commonly referred to as transfer of training.
- Level IV is a measure of the final results that occur due to training, including increased sales, higher productivity, bigger profits, less employee turnover, and improved quality (Kirkpatrick, 1998).

The model is presented in Figure 1.

Figure 1

Kirkpatrick Model for Evaluation

Evaluation Level	Learning Level	Purposes	Tools
Level I Reaction and planned action	How well did the trainee like the training program? Kirkpatrick says, "Measuring reaction is the same thing as measuring customer satisfaction."	Determine trainees' satisfaction level. Identify the strengths and weaknesses of the program. Evaluate the instructor's ability to present the program. Determine participants' needs. Obtain quantitative data that can be used to establish performance standards for future programs. Help decide who should participate in future programs. Collect data that will assist future marketing programs.	Smile sheet (simple, short, and fun)
Level II Learning	What knowledge or skills did the trainee learn as a result of the training? The on-the-spot evaluation is the centerpiece for all instruction and a key checkpoint in the training evaluation.	To improve the design or delivery of learning events. To increase the use of the learning on the job. To make decisions about learning in the organization.	Pre-test and post-test (oral, essay, true-false, or multiple choice) Case studies Simulations
Level III Behavior	What is the relationship between learning and using the information on the job by the trainee? From a client's perspective, this level of evaluation is most valuable and provides evidence of program success.	What has changed on the job as a result of the training program? Provides proof of whether or not transfer of knowledge has occurred. Identifies obstacles and barriers to transfer. Shows performance improvement. Accountability for training.	Surveys Interviews Focus groups On-the-job observations
Level IV Results	What are the outcomes of the training (such as reduced costs, reduced turnover, improved profits, increased quality, and increased production) exhibited in the work setting by the trainee?	Business impact is needed to: Demonstrate contribution to the organization. Link programs to efficiency. Set priorities. Justify change.	Performance records Action plan Performance contracts Hard data: output, quality, cost, and time. Soft data: work habits, work climate, and customer satisfaction.

METHOD

Levels I, III, and IV of the Kirkpatrick Model were used in this evaluation. Level II was omitted because the trainers determined that there was not enough time in the workshop to include a test for measuring knowledge gained. All sessions of the First Choice Procurement System Workshop conducted during 2003, both the one-day and three-day formats, were included in the evaluation. All participants were asked to evaluate the training (Kirkpatrick Level I) at the end of the workshop using a one-page sheet. A sample of the evaluation sheet used for the three-day workshops is shown in Appendix B.

In May 2004, 12 to 18 months following participation in the workshop, a survey was mailed to participants to evaluate change in behavior (Kirkpatrick Model Level III) and results of knowledge gained from the workshop (Kirkpatrick Model Level IV). This was the same protocol used in 2001. It was determined by two of the researchers involved in the 2001 study that 12-18 months was an appropriate length of time for participants to implement practices based on knowledge gained from training. The survey was two pages and included two demographic questions. This survey is shown in Appendix C.

LIMITATIONS

Four major limitations existed in this study.

- The sample used in this study did not represent all participants of the workshops, only those for whom a complete mailing address was available. On several occasions NFSMI was unable to obtain a list of participants from state agencies sponsoring the First Choice Procurement Workshop and therefore could not include these individuals in the study.
- The reaction phase of the evaluation (Kirkpatrick Model Level I) instrument was modified in two ways. It was modified in mid-year for format as well as modified for one-day programs. The three-day evaluation instrument was modified for the one-day training by omitting topic areas not covered in the one-day workshop. Although some components were identical in all instruments, the same instrument was not used for all workshops.
- Participants may not have had enough time between completing the workshop and receiving the survey (Kirkpatrick Model Level IV) to evaluate operational enhancements.
- Because the evaluation process was planned based on a three-day workshop and the workshop was modified to a one-day format to meet the needs of one state agency, some of the workshop material was omitted. Therefore, the evaluation instrument was modified which limited data for evaluation of the three-day workshop.

RESULTS

The survey was mailed to 87 participants for whom NFSMI had mailing information. Of the 87 surveys mailed, five were returned for wrong address or because the participants had changed jobs and one was returned from a state agency staff. Those returned were not included in the study. Of 81 viable surveys, 31 (38%) were returned.

Of the 31 participants returning surveys, 9 were from school districts of fewer than 2,500 students, 15 from districts of 2,500 to 10,000 students, 4 from districts over 10,000 students, and 3 participants failed to answer this question. Urban districts were represented by 2 participants, suburban by 12, rural by 10, and 7 failed to answer the question.

Results of the reaction phase of the evaluation (Kirkpatrick Model Level I) showed that participants were very satisfied with the seminar overall. Of those evaluating both the one-day and three-day formats, 97% of the participants rated the seminar and program materials overall as either excellent or above average.

As a result of attending the First Choice Procurement Workshop, 25 participants made changes in their operation, while 6 made no changes (Kirkpatrick Model Level III). Of the 25 making changes, the most frequent change was having more open discussion with vendors (19), followed by developing more complete purchasing specifications (18). Complete results are shown in descending order in Table 1.

Table 1

Changes as a Result of the First Choice Procurement Workshop

Categories	Number
I have more open discussions with vendors.	19
I developed more complete purchasing specifications.	18
I modified the bid document.	14
I now monitor prices regularly.	13
I modified my bid process.	13
I now spot check products to ensure specifications are met.	11
I evaluate quality more closely as part of the receiving process.	10
I now hold a pre-bid conference.	7
I now use the RFP procedures for purchasing products or services with subjective criteria.	6
I established standard stock levels for repeat-use items.	6
I established standing orders for products that are ordered weekly.	5
I converted to "approved brands only" to help with quality control.	5
I developed acquisition or critical paths for my purchasing process.	4
I joined a purchasing co-op.	4
I now conduct a market area analysis.	3
I modified my pre-bid conference.	2
I revised my receiving practices to include HACCP.	2

Results of this study were similar to those of the 2001 study. Table 2 shows the top five changes made by participants in the 2001 and 2004 studies. In 2004, the top change was having more open discussions with vendors, while in 2001 that was the second highest change.

Table 2

Comparison of 2004 and 2001 Top Five Changes

2004	2001
I have more open discussions with vendors.	I now monitor prices regularly.
I developed more complete purchasing specifications.	I have more open discussions with vendors.
I modified the bid document.	I now spot check products to ensure specifications are met.
I now monitor prices regularly.	I evaluate quality more closely.
I modified my bid process.	I modified my bid process.

In the 2004 evaluation, participants were also asked whether, as a result of implementing practices learned during the First Choice Procurement Workshop (Kirkpatrick Model Level IV), food cost, plate cost, inventory cost, and time spent on purchasing increased, decreased, or stayed the same; or whether they did not know. The majority (48) of the participants said food cost, plate cost, inventory cost, and time spent on purchasing stayed the same, while 29 said they decreased. Results are shown in Table 3.

Table 3

Time and Cost Changes

Category	Increased	Decreased	Stayed the same	Do not know
Food cost *	0	7	9	8
Plate cost *	1	5	13	5
Inventory cost *	1	9	9	5
Time*	8	8	8	0

* Only 24 of the 25 participants responded to the question

At the beginning of each workshop participants were asked to create a “short list” of items about purchasing that they wanted to change in their operation within one to two years. On the mail survey, participants were asked to identify items from this list that they were able to accomplish. Of the 25 completing the survey, only 17 respondents identified items from their “short list” that they were either working on or had completed. Complete results are shown in Appendix D. In addition, participants were asked to identify items from their “short list” that they plan to complete in the next two years. Eleven participants answered this question. Results are shown in Appendix E. Completion of these items shows that a few participants have accomplished some of the operational objectives identified by NFSMI and have changed some behaviors (Kirkpatrick Model Level III).

CONCLUSIONS

Participants in the First Choice Procurement Workshop were, overall, pleased with the content and materials presented in the workshop. As customers they were highly satisfied with what they received in the training. However, 12 to 18 months following the training, only a few behaviors of a small number of participants who returned the survey were changed. Additionally, changes in operational results were shown only in a few cases. However, the failure to change behavior and operations may be due to insufficient time between the workshop and completion of the evaluation survey. It may take longer than the estimated 12 to 18 months to make purchasing-related changes. In addition, child nutrition professionals have multiple responsibilities and may not have been able to spend enough time on purchasing responsibilities because of other demands, resulting in few changes being made.

Another mitigating factor is that some of the participants in the study only attended a one-day training session and may not have gained the depth of knowledge needed to make purchasing changes in their operation.

RECOMMENDATIONS

- NFSMI should continue training program evaluation by including Levels II, III, and IV from the Kirkpatrick Model in all sessions of one training program per year.
- Future evaluations should include differentiation by length of the program, and programs of various lengths should be analyzed separately.

REFERENCES

Kirkpatrick, D. (1998). Great ideas revisited. In D. Kirkpatrick (Ed.), *Another look at evaluating training programs* (pp 3-8). Alexandria, VA: American Society for Training and Development.

APPENDIX A
First Choice: A Purchasing Systems Manual for School Food Service, 2nd Edition,
Chapter Objectives

First Choice: A Purchasing Systems Manual for School Food Service, 2nd Edition,
Chapter Objectives

Chapter 1: Step by Step

1. Identify the steps in the purchasing function.
2. Point out the differences between placing food orders and managing the purchasing process of a Child Nutrition Program (CNP).
3. State the two basic forms of public purchasing guidelines.
4. Point out unethical procurement practices.
5. Identify the elements of an administrative hearing procedure.

Chapter 2: The Regulatory Environment

1. Identify where child nutrition purchasing regulations can be found.
2. Explain what a standard of identity is and why it is important.
3. Explain what grade standards are and how to access them.
4. Identify Federal food laws dealing with food quality and safety and explain their purpose.

Chapter 3: The Market Place

1. Explain the relationship among the players in the food distribution chain.
2. Explain why today's business climate is a sellers' market.
3. State ways of "selling" school districts as good business partners.
4. State the purpose of doing a market area analysis.
5. Identify the steps for doing a market analysis.
6. Explain why vendor evaluation is important.

Chapter 4: The Product Movement Process

1. Explain the important effect product movement has on cost management.
2. Explain how warehousing food creates costs in addition to food costs.
3. State the advantages of just-in-time (JIT) product movement.
4. Classify foods as standard stock, low volume, or menu items.
5. State why it is important to manage food orders in order to establish a stable number of cases ordered per delivery.
6. Develop an order calendar for product delivery.
7. Describe safety considerations for storing food, such as cleanliness, FIFO (first in first out), and proper time and temperature.

Chapter 5: Allocating Time Resources to Product Categories

1. Explain why it is necessary to prioritize food items before writing specifications.
2. Identify ways to establish time priorities with food items.
3. Classify foods by "distributor's choice," "private label," or "manufacturer's brand."
4. Explain why it is important to classify as many products as possible as "distributor's choice" or "private label."

Chapter 6: Determining Bid Units

1. Explain why selecting bid units for food is different from and more complex than selecting them for other supplies purchased by school districts.
2. Assign bid units to different types of food products.
3. Select the appropriate number of decimal places for a bid unit.
4. Identify when the decimal should be rounded when converting bid prices to case prices.

Chapter 7: Developing Product Specifications

1. Explain the difference between technical specifications and food descriptions.
2. State why food descriptions with pre-approved brands are more practical for school bids than technical specifications are.
3. Identify the steps in writing descriptions for one-ingredient, one-major-ingredient, and multiple-ingredient (highly processed) foods.
4. Identify references available to use for writing product descriptions.

Chapter 8: Brand Approval

1. State the two systems for brand approval and explain the differences between them.
2. Place in sequential order the steps for prior approval of brands (approved-brands-only system).
3. State the differences between the first and final pre-bid conferences.
4. Identify activities involved in paper screening, appearance screening, and taste screening.
5. Evaluate brand labels submitted for pre-approval.

Chapter 9: Getting Ready to Obtain Prices

1. Design a critical path for procurement.
2. State the time lapses needed in regard to screening product, preparing draft documents, conducting pre-bid conferences, issuing price requests, and evaluating and awarding the bid.
3. Explain why it is a good idea for a third party to be involved in the procurement process.
4. Explain bid protocol.

Chapter 10: The Purchase System

1. State the major requirements of Federal procurement regulations.
2. Explain the four purchase procedures.
3. List the three conditions under which noncompetitive negotiation can be used.
4. Explain methods for evaluating a request for proposals (RFP).
5. List the characteristics of and the differences between the line-item and bottom-line award methods.
6. State the three pricing mechanisms.
7. Recommend appropriate pricing structures for product categories.
8. Identify benefits to the school district of market-based methods of purchasing.
9. State desirable features of purchasing software.

Chapter 11: Monitoring Costs

1. Identify sources for market reports that may be used to verify requests for price increases.
2. Analyze a petition for escalation/de-escalation and decide if it is reasonable.
3. Calculate new prices for milk and other products.

Chapter 12: Laboratory Testing of Products

1. Name sources for identifying accredited labs.
2. Explain why laboratory testing can be expensive and why requests that are out of the ordinary should be considered seriously.
3. Name two databases that supply nutrient information
4. Explain why not all nutrient analyses of processed foods are accurate.
5. Explain the Federal food recall process and identify where to obtain information on food recalls.

Chapter 13: Receiving and Storage

1. List the essentials of a receiving procedure that ensures quality control with no missing links.
2. State the receiving procedures on which personnel need training.
3. Identify the following code numbers that identify product: establishment number, code number, run or date number, and the Child Nutrition (CN) label number.
4. Identify proper food storage procedures.
5. List appropriate equipment and conditions for an efficient receiving area.
6. Name appropriate features of a feedback system.

Chapter 14: Purchasing Cooperatives

1. Explain the benefits of belonging to a purchase cooperative.
2. Explain why the first two to three years of a cooperative organization require a strong commitment of time.
3. Explain why cooperative membership demands flexibility.
4. State guidelines for operating a successful cooperative operation.
5. Name different methods for administering a cooperative.
6. Identify the steps in forming a purchasing cooperative.

APPENDIX B
Participant Evaluation - First Choice Procurement Workshop

Participant Evaluation First Choice Procurement Workshop

Date: _____ Location: _____

Instructor(s): _____

Please check the box that best describes each of the following.

	<i>Excellent</i>		<i>Average</i>		<i>Needs Improvement</i>
	1	2	3	4	5
Overall Seminar					
Chapter 1. Step by Step					
Chapter 2. The Regulatory Environment					
Chapter 3. The Market Place Environment					
Chapter 4. The Product Movement Process					
Chapter 5. Allocating Time Resources to Product Categories					
Chapter 6. Determining Bid Units					
Chapter 7. Developing Product Specifications					
Chapter 8. Brand Approval					
Chapter 9. Getting Ready to Obtain Prices					
Chapter 10. The Purchasing System					
Chapter 11. Monitoring Costs					
Chapter 12. Laboratory Testing of Products					
Chapter 13. Receiving and Storage					
Chapter 14. Purchasing Cooperatives					
Pace of the seminar					
Seminar materials					
Meeting room					

What did you like best about the seminar?

How could the seminar be improved?

APPENDIX C
First Choice Procurement Workshop Evaluation

Date

Dear First Choice Procurement Workshop Participant:

Please take ten minutes from your busy schedule to complete the following survey about the usefulness of the First Choice Procurement Workshop you attended several months ago. Completing this evaluation will help us continuously improve the products and services developed by The National Food Service Management Institute. A return envelope is enclosed for your convenience. Please return the survey by June 1, 2004.

This project has been reviewed by the Human Subjects Protection Review Committee at The University of Southern Mississippi, which ensures that research projects involving human subjects follow federal regulations. Any questions or concerns about rights as a research subject should be directed to the chair of the Institutional Review Board, The University of Southern Mississippi, Box 5147, Hattiesburg, MS 39406, (601) 266-6820. Return of this survey indicates voluntary participation.

Thank you for assisting with this project. If you have any questions concerning the survey, please telephone 601-266-5773 or e-mail me MK.Meyer@USM.edu.

Sincerely,

Mary Kay Meyer, PhD, RD
Senior Research Scientist

First Choice Procurement Workshop Evaluation

1. As a result of attending the First Choice Procurement Workshop, I made changes in my operation. YES NO

If you answered NO to this question, please complete the last question and return the survey in the envelope provided.

If you answered YES, **please mark (x) all of the categories** in which you made changes.

I now conduct a market area analysis.

I established standard stock levels for repeat-use items.

I established standing orders for products that are ordered weekly.

I developed acquisition or critical paths for my purchasing process.

I now monitor prices regularly.

I converted to “approved brands only” to help with quality control.

I have more open discussions with vendors.

I developed more complete specifications.

I now use the RFP procedure for purchasing products or services with subjective criteria.

I modified my bid process.

I modified the bid document.

I now hold a pre-bid conference.

I modified my pre-bid conference.

I joined a purchasing co-op.

I revised my receiving practices to include HACCP.

I now spot-check products to ensure specifications are met.

I evaluate quality more closely as part of the receiving process.

Other _____

Over **L**

Please circle one answer for each question.

2. As a result of implementing practices learned during the First Choice Procurement Workshop:

a. My food costs have

Increased Decreased Stayed the same I do not know

b. My plate costs have

Increased Decreased Stayed the same I do not know

c. My inventory costs have

Increased Decreased Stayed the same I do not know

d. The amount of time I spend on purchasing has

Increased Decreased Stayed the same I do not know

3. On the first day of the seminar you created “My Short List” of items about purchasing that you wanted to change in your operation within one to two years. From that list, which items have you been able to accomplish?

4. From “My Short List,” what items do you plan to complete within the next two years? _____

5. What is your district enrollment?

- 1. Less than 2,500
- 2. 2,500-10,000
- 3. Greater than 10,000

6. How is your district classified?

- 1. Urban
- 2. Suburban
- 3. Rural

Thank you

APPENDIX D
Completed or In Process “Short List” Items

Completed or In Process “Short List” Items

Review bid specs (2)
Monitor the market (2)
Check deliveries from vendors (quality of products and place of origin)
Better inventory control
Better bid procedures with co-op
Better prices on produce, bidding weekly
Freezer monitor checklist established
Developed spreadsheet of foods ordered with prices
In process of overhauling total bid process
Joined a co-op
Standardized all products
Decreased inventory at the school level
Limited the number of items on my bid
Modified bids
Conduct more thorough inventory.
Developed better specs for ordering
Private labels, warehouse training, and check grades against choice plus
Reevaluated which items to bid directly to the manufacturers
Changing specs to say “distributor choice” PR/L

APPENDIX E

“Short List” Items Participants Plan to Complete Within the Next Two Years

“Short List” Items Participants Plan to Complete Within the Next Two Years.

- Improve specifications (4)
- Better inventory control
- Better bid procedures
- Cooperative bid structure
- Less number of deliveries
- Decrease number of items
- Decrease food cost
- Grade products
- Improve receiving practices
- Look at warehouse vs. site
- Look more at working on food bids
- Train personnel
- Convince rep that writes bid specs to not allow "or equal to" must be specific
- Use HACCP in receiving
- Establish small equipment bid