

# CONSULTING SERVICES

A school foodservice director probably will need to hire a consultant to help with various aspects of planning and implementing a centralized foodservice system. A consultant may be hired because the foodservice director has limited time to complete all tasks required and because the consultant adds expertise, objectivity, and credibility to a project. There are two major points in time at which a consultant may need to be hired: to conduct the feasibility study and to plan the central kitchen. The director will need to follow a systematic process in recruiting and selecting a consultant to ensure that a good selection decision is made. This chapter will focus on:

- Developing the Request for Proposals (RFP)
- Selecting the consultant
- Working with the consultant

## Developing the Request for Proposals

When the foodservice director is ready to conduct a feasibility study for a central kitchen, one of the first steps is to develop a request for proposals (RFP). An RFP is a formal written document developed to invite potential bidders to submit a proposal to provide the services that are requested. The RFP should be distributed widely enough to generate a pool of proposals from high quality consultants.

A school foodservice director may want to contact other directors with central kitchens to determine consultants they used and how satisfied they were with the consultants. The RFP could be distributed to those consultants. In addition, the Foodservice Consultants Society International ([www.fcsi.org](http://www.fcsi.org)) could be contacted. This organization has a *Membership Directory* and a *FSCI Consulting Firm Directory* that can be accessed through their Web site. The organization also has an on-line “Request for Consultant Form” that can be used to get assistance in locating a consultant who meets your specifications.

The school foodservice director considering a central kitchen also will be reviewing trade publications to determine what others are doing. Publications such as *Food Management*, *School Foodservice & Nutrition*, and *FoodService Director* feature new foodservice system designs. These resources can provide useful leads for good consultants. The school foodservice director contemplating a new system in the future probably will want to clip articles from these sources and save them in a resource file for later use.

Buzalka (2000) wrote an article on developing an RFP, which provides guidelines on the format. Holtz (1989) and Kelly (1993) also provide guidelines for developing RFPs. These suggested guidelines have been combined and modified to meet the requirements for school foodservice central kitchen projects. The model outline includes:

### **1. Cover Sheet**

- Name and location where services will be required
- Type of services required
- Financial terms
- Dates for services, when project starts and ends
- Date and time for pre-proposal meeting/site tours/interviews
- Address where meeting will be held

### **2. Proposal Instructions and Requirements**

- Contact person (name, address, e-mail, and telephone number)
- Proposal due date
- Delivery date
- Proposal evaluation criteria
- Format instructions

### **3. Statement of Work**

- Description of need/problem
- Summary of the school district philosophy and operation
- Brief description of the current facility, which might include enrollment projections, financial status, etc.
- Brief description of plans for the project, including the desired end result
- Schedule for the project
- Detailed plan
- Budget guidelines

### **4. Qualifications of Provider**

- Type of business—corporation, partnership, sole proprietorship
- Financial status of business
- Resumes of principals
- Description of support staff
- References

## 5. Evaluation Criteria

- Written Proposal
- Credentials
- Interview

### Selecting the Consultant

It is important to hire a good consultant early in the planning process. School foodservice directors often are too busy to be able to complete all of the research necessary for planning a centralized foodservice system and often do not have expertise in planning a new system and building. It is likely that a foodservice consultant will be hired to conduct the feasibility study. This person should have experience in conducting feasibility studies related to centralized foodservice systems. Once the decision to build a central kitchen has been made, another consultant may be hired to plan the system. This foodservice consultant will work with the architects who may not have extensive experience in building foodservice facilities. Thus, it is important to choose a consultant who has experience in planning central kitchens.

Three major areas will be considered in the selection process: the written proposal, references, and interview.

#### Written Proposal

The written proposal will give the selection committee an opportunity to evaluate many aspects of a potential consultant. The written proposal should:

- Document experience working with school foodservice.
- Show that the bidder has a thorough understanding of the problem/need of the school foodservice operation.
- Present an appropriate technical approach for the proposed work.
- Present a realistic timeline/schedule for the work to be done.
- Demonstrate good written communication skills.

#### References

Individuals submitting proposals should be asked to provide references for recent work they have completed. Samples of work also may be requested. References should be contacted to determine the following:

- Reputation of the consultant
- Follow through of the consultant

- Satisfaction of former clients with the work of the consultant
- Capabilities of the consultant; for example, has the consultant designed a facility you like

Kelly (1993) suggests some potential questions that might be asked of individuals giving a reference including:

- Was the consultant cooperative when things were not going smoothly?
- Which personnel from the firm actually performed the work on the contract?
- Would you hire this consultant/consulting firm again?
- Is there anything I should have asked that I did not ask?

## **Interview**

You may decide to conduct interviews with the consultants who submit the top two or three proposals. The interview will help determine aspects of a consultant that cannot be determined by written proposals, including:

- Listening skills. It is important to hire a consultant who is a good listener, not one who knows it all.
- Oral communication skills.
- Ability to work with the foodservice director and staff. There are intangible factors, such as personality, that may be determined in an interview.

In addition, the consultant selected should:

- Have no association with specific equipment manufacturers.
- Be available during the life of the project and stay through the end of the project.
- Know food production.
- Exhibit good follow-through.
- Have expertise in bidding, not necessarily the “low” bid.
- Have experience in specification development.
- Understand expectations.

The foodservice director also should consider the following factors:

- Time factors. How many other projects does the consultant have and what is the schedule for those projects in relation to the current project.
- Geographic location. This usually is not a factor. With the availability of e-mail communications, location of the consultant should not be a major factor.
- Compatibility with architect. It may be in the contract that the architect hires the consultant from your list. For planning the building, it is essential that the consultant have good working relationships with all of the project managers.

- Consultant works for foodservice and should meet the needs of the foodservice program.
- Bid by job or project rather than by time. There will be a total dollar bid for the entire project.

## **Selection/Evaluation Criteria**

The selection/evaluation criteria for the proposals should be developed prior to releasing the RFP and should be included as part of the RFP to let potential bidders know what will be considered in reviewing the proposals. There are many criteria that could be used for making selection decisions. Holtz (1989) suggested eight potential criteria: technical approach, plan, management, staffing, qualifications, resources, references, and special items. Kelly (1993) also identified eight criteria: objective factors, qualifications, value, understanding of project, approach to project, quality of work, personnel, and intangible factors. Suggestions of criteria from these sources, along with feedback from school foodservice directors of central kitchens, provided the basis for developing selection criteria and an evaluation form (Exhibit 6.1). The selection team should review the criteria prior to the selection process and modify to include criteria important for the project. They also may want to adjust the point allocation based on the importance of criteria for a specific project.

## **Selection Committee**

A selection committee should be formed to review the proposals submitted. The selection committee might be comprised of the foodservice director, school business official, and other planning committee members as appropriate. The committee members should represent different perspectives, including foodservice operations, finances, and regulations.

## **Screening Process**

Holtz (1989) suggests a three-stage screening process. The first screen involves reviewing the proposal package to determine inclusion of a transmittal letter, conformity of proposal with the RFP, introduction consistent with needs, and cost within appropriate range.

The second screen would be completed by the entire selection committee. This step would include a complete formal review of each proposal that was not omitted in the initial screen. The formal review score sheet, with criteria, should be completed independently by each committee member. Someone would summarize the responses, and the entire group would meet to review the results. This process should result in two or more proposals that meet the criteria.

The third screen, which may be optional, includes more careful budget considerations. It is at this stage that interviews may be conducted to determine the oral presentation skills, listening skills, and communication skills of the potential consultant. At the end of this stage, a consultant is selected.

## **Contract**

Once the consultant has been selected, a contract needs to be written and signed. The school foodservice director works with the school district administrators who seek contract review by legal counsel on developing and signing the contract. That process ensures that all of the legal considerations and federal, state, and local procurement regulations have been followed.

## **Working with the Consultant**

Working with the consultant often requires significant time on the part of the school foodservice director. Communication between the consultant and the foodservice director is critical for keeping the project on schedule. To that end, Kelly (1993) recommends that project managers (often the school foodservice director) provide:

- Prompt feedback on any work that has been submitted for review.
- Candid feedback. Let the consultant know if there are problems with the work completed as quickly as possible to allow for corrective action.
- Prompt replies to telephone (or e-mail) requests from the consultant.
- Copies of any relevant information/data on the operation.
- Briefings before any major meetings.
- Informal feedback after meetings.

## Exhibit 6.1 Consultant/Proposal Evaluation Form

Criteria	Points	Score	Comments
<p align="center"><b>WRITTEN PROPOSAL</b></p> <p>Demonstrates thorough understanding of the scope of the project            Provides description of major tasks            Presents appropriate technical approach            Proposes suitable plan            Presents a realistic timeline for deliverables            Communicates well:                Organized sequence                Convincing                Appropriate grammar</p>	<b>50</b>	_____	
<p align="center"><b>CREDENTIALS</b></p> <p><b>Experience</b>            Worked with school districts            Planned central kitchens</p> <p><b>Education/Background</b>            Foodservice experience</p> <p><b>References</b></p>	<b>50</b>	_____	
<p align="center"><b>INTERVIEW</b></p> <p>Demonstrates good listening skills            Demonstrates good verbal communication skills            Relates well with others            Responds well to questions</p>	<b>50</b>	_____	
<p align="center"><b>BUDGET/COST</b></p>	<b>50</b>	_____	

## References

Buzalka, M. (2000). You can always get what you want. *Food Management*, 35(8), 42-46.

Food Service Consultants International. (n.d.) Retrieved February 14, 2001, from <http://www.fsci.org>

Holtz, H. (1989). *Choosing and using a consultant: A manager's guide to consulting services*. NY: John Wiley & Sons.

Kelly, E.D. (1993). *Selecting and retaining a planning consultant*. Chicago: American Planning Association.