Candidate Information

for

Professional Skills Exam (2014)

FCSI - The Americas
www.fcsi.org

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Sections

[1] Some sections of the Table of Contents and Appendices are expanded with subheadings. These sections are more important to your understanding the steps in your quest for Professional membership in FCSI. The expanded sections contain very detailed information, and they offer you a clear recipe for being successful.

Appendices

FOODSERVICE CONSULTANTS SOCIETY INTERNATIONAL
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A. Candidate Preparation

Introduction

The Professional Membership Process (PMP) includes self-study and formal assessment of performance. You and FCSI-The Americas collaborate during this process so that you have the best chance of succeeding.

The PMP includes two examinations:

1. Industry Knowledge Exam (IKE)
2. Professional Skills Exam (PSE)

These exams ensure that a candidate seeking Professional member status within FCSI meets the basic standards of competency set for Professional members. Both the IKE and the PSE must be successfully completed by the end of your three-year period as a Senior Associate member. The IKE and the PSE exams may be done in any order or at the same time.

This version of the Candidate Information provides you with step-by-step guidance on how to prepare for and complete the PSE.

You best serve yourself by being aware of one procedural issue before starting preparation for the PSE.

1. There are deadlines for taking the PSE which relate to the end of your three-year period for completing the PMP as follows:

Exam	Deadline
PSE (Track #1)	The Executive Summary submitted at least 60 days in advance of the Oral Presentation.
PSE (Track #1)	The Oral Presentation delivered at least 30 days prior to the end of your three-year period.
PSE (Track #2)	The first submission, the Request for Approval of Oral Presentation, submitted at least 90 days prior to the end of your three-year period.

Note: There are two tracks for the PSE. The candidate chooses which one to take. The details differentiating the two tracks are described later in this section.

Professional Skills Examination (PSE)

Objective for PSE:

To measure a candidate's mastery of knowledge and skills for communication and presentations as defined in FCSI's Worldwide Core Competency Statements. The candidate demonstrates this knowledge and these skills by passing a written presentation and an oral presentation. The competencies are listed below.

1. Communication

   An FCSI Consultant can communicate effectively with people at all levels, whether oral or written, adapting language and approach as necessary for different audiences.

2. Presentations

   An FCSI Consultant has the knowledge and skills to design and deliver effective presentations.

Structure for PSE:

You may accomplish the PSE in either of two tracks. The two tracks are available in order to provide you with flexibility so that you can match the required activities with your typical work assignments as closely as possible. You select which track to undertake.

<u>PSE Track #1:</u>

This track is based on a specific proposal or project of your choice from your work experience. You might select this track because you want to learn more about writing an executive summary for a client and delivering an oral presentation on the proposal or project.

If you select this track[2], you write an executive summary and make an oral presentation for either a proposal or a project that you have completed in your work.

A review panel evaluates your executive summary and determines whether you pass. If necessary, you revise and resubmit the executive summary until you do. Another review panel, after listening to your oral presentation, completes an evaluation and determines whether you pass. If necessary, you revise the presentation until you do.

[2] Sections B and C describe the details.

PSE Track #2:

This track is based on your giving an oral presentation of your choice and writing a summary report of the presentation. Various oral presentation types qualify. The qualifying types include, but are not limited to, the following:

- a formal presentation at a conference
- a seminar at an educational institution
- a training session for a client's employees
- a project presentation to a client
- a design presentation to an architect

You might select this track because you have substantial presentation experience in your work and want to learn ways to design your presentations for future improvement. Or, you might select this track because your work usually requires a presentation type different from the type required in Track #1 and you want to improve your presentation performance in your work.

If you select this track[3], you identify an oral presentation that you have already given or intend to give in the near future and write a summary report on this oral presentation.

First, you request from FCSI-TA Staff approval of the oral presentation under a minimum set of specifications such as:

- your being the prime author and sole presenter,
- the topic being related to your work,
- your delivering the oral presentation while you are a Senior Associate member, and
- the evaluations of the oral presentation by the audience (or client) are available[4]

FCSI-TA Staff reviews the audience (or client) evaluations of your oral presentation and determines whether you pass. If necessary, you seek approval for a different presentation until you do.

Then, you write a summary report for the approved oral presentation. The review panel evaluates your summary report and determines whether you pass. If necessary, you revise and resubmit until you do.

Summary Comparison of PSE Track #1 to Track #2:

The following table compares several aspects for Track #1 and Track #2 so you can more easily determine which track is most aligned with your interests.

[3] Sections D and E describe the details.

[4] These evaluations may have several formats and content as described in Section E. For example, an organization sponsoring an educational session you delivered at a conference might provide summary evaluations collected from the session's audience. As another example, a client might write a letter providing summary evaluations of a presentation you delivered in the client's offices.

Aspects	Track #1	Track #2
How requirements for this track connect to your work.	Focus is on a specific proposal or project from your work.	Focus is on an oral presentation from your work.
Why you might select this track.	You want to learn more about writing an executive summary and delivering to the client an oral presentation about the proposal or project.	1. You have substantial presentation experience and want to learn ways to improve. 2. Your work doesn’t include the type of presentations as required in Track #1.
What the written submittal is for this track.	Executive Summary about your specific proposal or project.	Summary Report on your oral presentation written after the fact.
What the oral submittal is for this track.	Oral presentation delivered to review panel based on your proposal or project.	Request for Approval of your chosen oral presentation (already given or you intend to give). Audience (or client) evaluations of presentation must be available.
Pathway through this track.	1. Select proposal or project. 2. Write the executive summary. 3. Deliver the oral presentation.	1. Seek approval for chosen oral presentation. 2. Write the summary report.

The following subsections provide more information for each of the two tracks.

PSE Track #1:

The submittals for PSE Track #1 include an executive summary and an oral presentation, with the details as described in the following subsections.

Executive Summary:

Study/Preparation Process for Executive Summary:

A. You read the portion of the Body of Knowledge for PSE Track #1 as defined in Appendix 3 that relates to an executive summary.

B. You review the evaluation criteria for the executive summary as included in Section B. They are designed to help you understand the desired outcomes for an effective executive summary.

C. You have an assigned coach whom you may call anytime during the process for assistance. Your coach may critique your document prior to formal submission because your coach is not allowed on the review panel.

D. You write your executive summary in accordance with the following formatting requirements. The review panel provides these requirements so that you can submit a successful executive summary that is formatted properly in a PDF file and maintains your anonymity:
   - Arial or Times New Roman, Black Type, Size 12
   - One (1) inch margins top, sides and bottom
   - Your name must not be affixed to the document or be in its file name
   - Any reference to your firm or the client's name that might allow the review panel to identify you must be replaced by fake names (e.g., Firm XYZ, Client ABC)
   - Your member number must be inserted in the header, right aligned, with the following format: "Member Number: 00000000".

E. You send FCSI-TA Staff your executive summary by email as a PDF file. FCSI-TA Staff reviews your submittal to determine whether it meets the specifications stated above. If not, FCSI-TA Staff returns the submittal to you for correction. If the document is complete, FCSI-TA Staff distributes it to a review panel for evaluation.

F. You must ensure your executive summary is complete by the deadline specified on page 6. The review panel sets this deadline so you can receive your results and the review panel's comments in a timely manner. This allows time you to revise and resubmit your executive summary, if necessary, and to use the review panel's comments while you develop your oral presentation.

Evaluation Process for Executive Summary:

A. FCSI-TA Staff sends your executive summary, identified only by your member number, to be independently scored by at least three trained Professional members of FCSI who constitute a review panel. The review panel determines whether you pass and informs FCSI-TA Staff.

B. FCSI-TA Staff notifies you of the result and provides you and your coach written comments from those who scored your executive summary so that you are aware of its strengths and weaknesses.

C. If you pass, you move on to the oral presentation.

D. If you do not pass, you may revise and resubmit the document following the procedures outlined above. You may resubmit the document once without paying an additional fee. Resubmitting the document more than once requires payment of an additional fee. Contact FCSI-TA for the details.

Oral Presentation:

Study/Preparation Process for Oral Presentation:

A. You read the portion of the Body of Knowledge for PSE Track #1 as defined in Appendix 3 that relates to an oral presentation.

B. You review the evaluation criteria for the oral presentation as included in Section C. They are designed to help you understand the desired outcomes for an effective presentation.

C. You have an assigned coach whom you may call anytime during the process for assistance. Your coach may critique your presentation prior to formal delivery because your coach is not allowed on the review panel.

D. You prepare an oral presentation <u>that simulates as closely as possible the actual oral presentation</u> you gave on the project for which you did your executive summary and in accordance with the following requirements:
   1. Duration of presentation: maximum of 60 minutes, including Q&A with review panel.
   2. Appropriate visual aids included.
   3. Duration of subsequent debriefing session with review panel: maximum of 30 minutes.

E. You request one of the scheduled review panel sessions by contacting FCSI-TA Staff. FCSI-TA Staff can advise you of the dates and locations or you can find this information on the FCSI-TA website. You must ensure your executive summary is complete by the deadline specified on page 6.

F. You contact FCSI-TA Staff about the necessary electronic equipment for the presentation in order to ensure the compatibility of all equipment.

G. You complete a typed Preparation Analysis Sheet (in Appendix 1) and submit to FCSI-TA Staff two weeks prior to your presentation. This sheet sets the stage for the review panel to which you deliver your presentation. The review panel evaluates you on how well the presentation addresses the audience and environment you describe, so give thought to this information. Also, at the same time submit a signed Personal Release (in Appendix 1) for video recording.

H. You show up at the appointed location 15 minutes ahead of the presentation time.

I. You bring with you:
   - Four hard copies and one electronic copy in PDF format of any PowerPoint (in black & white and 4-slides-to-a-page format) or other handouts or visual aids that support your presentation to leave with the review panel.
   - The actual visual aids you need (e.g., charts and graphs).

Evaluation Process for Oral Presentation:

A. You make your presentation to some members of the review panel and possibly several Professional members. Your presentation is video recorded by FCSI-TA Staff for future use. The review panel determines whether you pass and informs FCSI-TA Staff.

B. Within 30 days after your presentation, FCSI-TA Staff notifies you of the result and provides you and your coach written comments from those who scored your presentation and, if you requested one, a video recording of the presentation so that you are aware of the presentation's strengths and weaknesses.

C. If you pass, FCSI-TA Staff, after determining that all other requirements for Professional member status have been satisfied, forwards your name to the Board of Trustees for its official notification of your having achieved Professional member status.

D. If you do not pass, you may revise the presentation based upon the review panel's comments and redelivery at the next available date. You may redeliver the presentation once without paying an additional fee. Redelivering the presentation more than once requires payment of an additional fee. Contact FCSI-TA for the details.

E. If you do not pass, you may choose to appeal the result by initiating the Appeal Policy as provided in the appendices.

PSE Track #2:

The submittals for PSE Track #2 include a request for approval of an oral presentation and a summary report of the oral presentation, with the details as described in the following subsections.

Request for Approval of Oral Presentation:

Study/Preparation Process for Request for Approval of Oral Presentation:

A. You review the request for approval of oral presentation form (in Appendix 1) and Section D to learn the specifications your submitted presentation must meet as an approved presentation.

B. You have an assigned coach whom you may call anytime during the process for assistance. Your coach may critique your document prior to formal submittal because your coach is not allowed on the review panel.

C. You complete a request for approval and submit it to FCSI-TA Staff for approval by a review panel by the deadline specified on page 6. The review panel sets this deadline so you can finish the Professional Membership Process in a timely manner.

D. FCSI-TA Staff seek evaluations for your submitted oral presentation from the contact(s) you provide in your request. The evaluations must be similar to one of the two types described in Section E. FCSI-TA Staff works with you to acquire the necessary evaluations. If FCSI-TA Staff is unable to acquire the valid evaluations, it requests that you submit another oral presentation for approval. If necessary, you submit presentations until you identify one for which valid evaluations are received by FCSI-TA Staff.

Evaluation Process for Request for Approval of Oral Presentation:

A. If the document is complete, FCSI-TA Staff reviews it and determines whether your evaluations pass.

B. If your evaluations pass, FCSI-TA Staff notifies you and you move on to the summary report of oral presentation.

C. If your evaluations do not pass, FCSI-TA Staff notifies you and asks that you submit another presentation for approval. If necessary, you submit presentations until you identify one for which FCSI-TA Staff receive passing evaluations. You may resubmit the request once without paying an additional fee. Resubmit the request more than once requires payment of an additional fee. Contact FCSI-TA for the details.

Summary Report of Oral Presentation:

Study/Preparation Process for Summary Report of Oral Presentation:

A. You read the portion of the Body of Knowledge for PSE Track #2:
   - Presentations for a Positive Impact by Sergay and
   - Summary Report by CPSTA.

B. You review the evaluation criteria for the summary report of oral presentation as included in Section E. They are designed to help you understand the desired outcomes for an effective summary report.

C. You have an assigned coach and you can call that coach anytime during the process for assistance. Your coach may critique your document prior to formal submission because your coach is not allowed on the review panel.

D. You write your summary report in accordance with the following formatting requirements. The review panel provides these requirements so that you can submit a successful summary report that is formatted properly in a PDF file and maintains your anonymity:
   - Arial or Times New Roman, Black Type, Size 12
   - One (1) inch margins top, sides and bottom
   - Your name must not be affixed to the document or be in its file name
   - Any reference to your firm or the client's name that might allow the review panel to identify you must be replaced by fake names (e.g., Firm XYZ, Client ABC)
   - Your member number must be inserted in the header, right aligned, with the following format: "Member Number: 00000000".

E. You send FCSI-TA Staff your summary report by email as a PDF file by the deadline specified on page 6. FCSI-TA Staff reviews your submittal to determine whether it meets the specifications stated above. If not, FCSI-TA Staff returns the submittal to you for correction. If the document is complete, FCSI-TA Staff distributes it to a review panel for evaluation.

Evaluation Process for Summary Report of Oral Presentation:

A. FCSI-TA Staff sends your summary report, identified only by your member number, to be independently scored by at least three trained Professional members of FCSI who constitute a review panel. The review panel determines whether you pass and informs FCSI-TA Staff.

B. Within 30 days after receiving your final submittal, FCSI-TA Staff notifies you of the result and provides you and your coach written comments from those who scored your summary report so that you are aware of its strengths and weaknesses.

C. If you pass, FCSI-TA Staff, after determining that all other requirements for Professional member status have been satisfied, forwards your name to the Board of Trustees for its official notification of your having achieved Professional member status.

D. If you do not pass, you may revise and resubmit the document following the procedures outlined above. You may resubmit the document once without paying an additional fee. Resubmitting the document more than once requires payment of an additional fee. Contact FCSI-TA for the details.

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B. Evaluation of Executive Summary for PSE Track #1

Executive Summary Criteria

To the reader: *Please note that these criteria for the executive summary are written in first person and present tense. The shifts in person and tense purposefully support your ownership, accountability and success in your submittal. Please contact your coach with any questions you have.*

The following guidance for writing an executive summary is for me so that I am more likely to succeed in passing this step in my quest for Professional member status in FCSI. As importantly, the information shared here supports the ongoing excellence of my written communication with my own clients in ways that are more professional and effective.

The following criteria offer me support in my process of developing my submittal.

- Together these criteria represent a comprehensive yet detailed description of a professionally written executive summary for me to use as I write my submittal.
- Each criterion provides a standard by which the review panel assesses my submittal.
- Each criterion provides a standard with which I may ask my coach or an associate to critique my draft submittal.

An Executive Summary

I am aware that an executive summary is an abstract of a larger document so that decision makers can comprehend its major points in a brief reading. This is because these decision makers seldom read an entire document in detail. I understand that an effective executive summary presents the broad themes and major issues through clear, concise and comprehensive content.

The Detailed Criteria

The detailed criteria for a professional and effective executive summary are:

- **Readability:** I write my executive summary in such a way that it is clear and accessible to anyone, at any level, to read and comprehend.

- **Focus:** I focus my executive summary on my client's organizational issues and outcomes while keeping technical terms and content to the minimum. I include only those issues supporting my key points and relevant to the client's decision making.

- **Project Strategy:** I present winning themes/strategies for my client in my executive summary, and I clearly and concisely describe these themes/strategies.

- **Tone:** I am aware that the tone of an effective executive summary conveys to the client an implied meaning about my professionalism. My summary feels objective and positive, yet honest and genuine, to the reader.
- **Count:** I balance the number of times I mention the client's name and mine so that the executive summary emphasizes the client's name. I am aware my guideline is a ratio of 3:1 in favor of the client.
- **Length:** My executive summary is just long enough to present my critical points, but no longer than three pages. I use bullets and bolding of select words to make my key points, without excessive verbiage.
- **Continuity:** My executive summary flows in a logical and smooth manner without jumping from one point to another in a choppy fashion. I am aware that an effective format shows a clear connection from beginning, to middle, to completion/end.
- **Comprehension:** My executive summary clearly conveys my purpose, message and key recommendations to a reader who only skims the executive summary.
- **Accuracy:** I ensure there are no errors in spelling, grammar and punctuation.
- **Conclusion:** I end my executive summary with clear conclusions supporting the client/reader to know what to do and/or how to begin and the impact of these actions.

Sample One: Executive Summary

Residence Life Master Plan

OBJECTIVES AND METHODOLOGY

In November 2008, University of State X ("US" or "University") engaged Harris and Harris ("H&H") to prepare the Residence Life Master Plan. The goal of the master planning process was to develop a long-term strategy for the Department of Residential Life that would address existing residential facilities and potential new buildings. H&H's scope included an analysis of the University's strategic objectives, a peer institution survey, and an off-campus market analysis. Student preferences were evaluated in focus groups and through an Internet-based survey. At the conclusion of the study, H&H developed a phasing strategy and supported it with a system-wide financial model.

This document outlines the master-planning process and puts forward the recommendations with respect to residential facilities at US.

FINDINGS

The student population at US is expected to grow from 23,000 to 27,000 during the next decade. With a large percentage of this growth coming from out-of-state, the University will have to provide its students with appropriate "quality of life" facilities including student housing and dining. Recognizing this need, US's senior administration expressed the following objectives to be considered in the planning process:

- Improvement of US's competitive position in recruitment and retention of quality students;
- Creation of marketable residential facilities through new construction and development of appropriate strategy with respect to the existing buildings;
- Earning the designation of "Residential Campus" as a function of the improved residential life offerings matching the quality and the success of the Greek housing at US;
- Provision of appropriate quality and quantity (90% of enrollment) of housing for freshmen who will be required to live on-campus starting in the academic year 2009/2010;
- Offering of appropriate housing to students who will choose to live on campus beyond their freshmen year;
- Creation of residential neighborhoods located throughout the campus rather than concentrated in one area;
- Maintaining financial balance of the entire housing system during the implementation of the master plan.

US's peers are in the process of improving their residential facilities. University of South State is implementing a residential master plan that will increase the housing capacity from 5,300 to 6,600 beds. University of West State opened the Honors Residential College in 2007. The new facility offers 6010 beds and academic support spaces such as multimedia classrooms, study spaces, and a large activity room. University of North State is improving its competitive position by building new apartments for upper-classmen and graduate students. University of East State opened a 1,200-bed complex in fall 2006. The new beds, configured as full-suites, are offered to students who live on campus beyond their freshmen year. University of Central State is planning a Residence Hall, which will provide 600 beds in semi-suites. The new building will be constructed to replicate a 100-year structure at the cost of $90,000 per bed.

The off-campus market in Centerville provides a wide range of student housing offerings. The majority of students at US live in the off-campus market within a two mile radius from the campus. While students can find benefits in living on-campus such as proximity to educational resources, living-learning experiences, and paying one bill per semester, the off-campus market provides more amenities and appeals to a wider range of the student population. Parking, air conditioning, and outdoor pools are common amenities. The amenities provided to the students at the most expensive properties include game rooms, lounges, and fitness centers. The property managers in some communities encourage events relating to the age of the population; for instance, University Estates hosts balcony decoration contests during the football season. Students in the focus groups also noted that they can find a higher degree of privacy when living off-campus. Rental houses also allow students to live with friends. Focus group participants commonly cited the lower cost of living off-campus as a reason for not living on-campus.

Student survey results confirmed the focus group findings. Eighty-eight percent (88%) of respondents indicated that cost of rent and utilities was either “very important” or “somewhat important” in their housing selection process. Other important factors were safety, proximity to classes, and size of rooms. Among the most popular amenities were: single rooms, private bathrooms, in-room Internet access, kitchens, and washers/dryers in the unit. Of the students who stated their preference to live in on-campus apartments, 84% indicated preference for full kitchens with full oven/range as opposed to smaller kitchenettes.

The survey results proved a strong demand for residential living at US. In order to quantify the demand, H&H narrowed down the target market to full-time renters living both on and off campus. Appropriate affordability thresholds were also included in the target market definition to maintain a conservative approach. With all these assumptions, H&H’s model indicates that 44% of the undergraduate students would be interested in living on-campus, if the units they desire were provided. In addition, 18% of graduate students at US expressed interest in the on-campus units presented in the survey. These capture rates translate into approximately 9,100 beds in the academic years 2015/2016 if the enrollment target of 27,000 students was achieved. The total number of beds shown in the demand analysis should be treated as a ceiling of potential supply, rather than an actual recommendation for construction.

RECOMMENDATIONS

Upon review of the US’s objectives and the market analysis findings, H&H recommends the following phasing strategy to address the needs of the US’s Residential Life program for the next 10 years.

- **Phase 1** (*Westside)* - to be completed for occupancy in Fall 2009 and provide 953 beds for freshmen and returning students;

- **Phase 2 (***Southside*) – to be ready for occupancy in Fall 2010 and supply 525 beds for freshmen and returning students;

- **Phase 3** – 1,300 beds for freshmen constructed in two phases – Phase 3A to be completed in Spring 2011 and Phase 3B to be completed in Fall 2011;

- **Phase 4** – 600 upper-classmen beds to be available for occupancy in Fall 2011;
- **Phase 5** – additional 650 beds for freshman projected to open in Fall 2012;
- **Haley's Hall** – a residence hall providing 153 beds for upper classmen and athletes.

Additional components of this master plan include renovation of the existing residence halls, de-densification of Wiley Hall, phasing out of Mullen Hall, McDougall Hall, Centerville Hall, Parsons Hall, Treat Hall, and Dorn Apartments. Furthermore, future new Sorority housing construction may require phasing out of West Hall, Barnard Hall, and Moss Hall.

FINANCIAL AND OCCUPANCY CONSIDERATIONS

The entire housing system will maintain a positive cash flow throughout the implementation of the recommended phasing strategy. The debt coverage in the academic year 2005/2006 is projected to be 1.24:1. In the most critical year, 2008/2009, the debt coverage will decrease to 1.06:1, at which point it will start to gradually increase to reach 1.45:1 in 2014/2015, and exceed it thereafter. Some cross-subsidization will have to occur within the housing system to stabilize the new projects during the first two to four years of operations.

As a way to improve the cash flow and reduce the potential occupancy risk resulting from the delivery of a large number of beds in a relatively short period of time, H&H recommends considering delaying some of the proposed phases and making them contingent upon meeting the enrollment targets. In addition, H&H recommends monitoring the off-campus market to assess the degree to which its new supply may pose occupancy risk to the on-campus housing.

Sample Two: Executive Summary

Campus Dining Strategic Plan

OBJECTIVE/GOALS: Sonic Consulting Services has been retained to develop a strategic plan for campus dining services at the Modern University. The **goals are** to provide the framework for provision of a **quality campus dining program** at a **reasonable cost** to students; **attract future students**; contribute to **healthful lifestyles**; build campus **community;** provide for an **orderly modification of facilities;** and assure **financial stability** for the program.

FINDINGS: The current program **revenues ($14,140,000**) come primarily **from meal plans** sold **to resident students (25% of campus population)**. The other **75% represents a cash market** for dining services. **Catering is underpriced; inefficient** and does not contribute to the bottom line. The new food court is attractive, but inefficient to operate and while operating losses have been reduced in the last 8 months, it is still losing money. There are four board dining commons that are old and antiquated in terms of the style of service and type of foods that can be prepared and served.

The meal plans have been changed over time to allow first year students to use their meal plans for food delivered to the campus from outside restaurants (commonly known as the Dine Off program). This program has resulted in **less community building** over meals in the dining commons and has **eroded the financial base** to support the dining. While the restaurants pay a commission to the campus dining, it does not make up the difference. Campus dining has to be ready to serve all the students at every meal but when they order from Dine Off instead of using the commons that extra food and labor is frequently wasted. Operating systems such as the management software, quality assurance program, and marketing plan have not been on a par with industry standards.

The **number and design of** the dining **commons result** in **overstaffing** relative to the number of students dining at each operation. **The facilities are old** and designed to provide limited food options prepared in the kitchen and served from a tray line. Effective campus dining today requires fresh food cooked to order in front of the students. Dining staff has done a commendable job of operating with the antiquated facilities and without updated systems support. With good leadership and support, this highly motivated and dedicated staff is prepared to implement the vision described herein.

CHALLENGES: it is imperative that there be **simultaneous efforts** to improve the operating systems while planning, designing and opening renovated dining facilities. Failure to do both concurrently will not attain the stated program goals.

Operations Challenges: **Reduce** the number of **board** dining **operations**; **increase** the amount of **display cooking** stations; improve operating **efficiencies** and **cost control**; restructure the meal plans; develop and implement a **campus wide marketing** plan; retrain employees; and expand and expedite **management information systems** to provide timely data for making management decisions.

Facilities Challenges: Reduce the total **square feet** of dining space; **balance the retail** (a la carte) space, concepts and locations with the **board** (all you care to eat) space, concepts and locations; provide service within a 3-city block radius of dense campus populations areas; and **improve the mechanical, electrical, plumbing**, and other infrastructure that supports dining.

A series of mandates have been developed to address the challenges identified below:

MANDATES FOR CHANGE:

Operations:

- **A.** **Restructure meal plans** to increase flexibility, encourage community building and to attract commuter as well as resident students, faculty and staff.
- **B.** **Transition** the Dine Off program to campus dollars.
- **C.** Develop and implement a three-year **marketing program**.
- **D.** **Purchase and implement** a **software system** that provides nutritional analysis, financial tracking, production management, inventory, and other management support.
- **E.** Adopt a **cost center type of accounting** for all dining points of sale/ operating units.
- **F.** Develop a staffing succession plan that will allow a reduction in total staff FTE's through attrition as the number of facilities decreases.
- **G.** Develop and implement an on-going **training plan for service and production staff** that will assure that the staff can maximize service/revenues in all dining establishments.
- **H.** Develop and implement an expanded program for **quality assurance.** This should supplement existing sanitation and safety programs and more broadly address food and service quality, merchandising, and other qualitative elements of a dining program.
- **I.** Incorporate catering into a venue that provides other retail or board food service.
- **J.** **Develop a new catering menu with pricing that reflects the actual real cost** of providing the service.
- **K.** **Develop** a set of **catering policies and guidelines** to assure consistent, efficient high quality catering from casual low budget events to premier upscale events.
- **L.** Work with the campus administration to **develop a set of policies and guidelines** for Campus Dining to use as it **determines** the **retail pricing** as well as days and **hours of operation** for the various campus operations.

Facilities:

- **A.** Research and fully develop **the concepts** that will be necessary to meet the campus vision.
- **B.** **Close** the dining center at **Blaine Hall** and use the space for relocation of the Auxiliary Services Administrative Offices.

C. Renovate Bottoms Dining Commons as a Marche concept dining facility. There could be seating on the lower level as well with the ability to close off access to the lower level during smaller conferences and weekends when the population is down.

D. Close Harris Commons when Bottoms Dining reopens and turn the building over to the University for other use.

E. Renovate Standard Hall, adding a third floor to the building to make the top two floors into a campus catering and conference center with retail dining outlets on the lower floor.

F. **Remove** the current **Taco Bell** from the Food Court and replace it with better traffic flow.

G. Consider **design alterations to secure the food court** when it is closed and the Coffee Den is open.

H. **Relocate the Starbuck's** in a location near the bookstore to result in a concept similar to the Barnes and Noble bookstore/coffee/reading room concept.

I. Develop a series of **portable cart/kiosk** operations that provide limited food and beverage service at peak hours along critical high traffic foot routes through the campus.

FINANCIAL ANALYSIS AND NEEDS

It is estimated that it will require **$20,000,000** to complete this facility plan over a period of four years. If all of the operating mandates are implemented there will be sufficient revenue after expenses to support this **debt at a rate of 5% over 20 years**. The **critical changes** that will **assure the payback of the bonds** are to 1) make **catering a revenue source** as it is on most campuses; 2) develop **meal plans that encourage use of the facilities;** 3**) reduction** of assigned **square footage** supported by dining; 4**) reduced staffing** through attrition; 5) improved **operating systems** to control costs and 6) **increased revenue** from more attractive, convenient locations and a sustained campus marketing program. A financial pro forma supporting the revenue and expenses are presented as an attachment.

Evaluation Form for Executive Summary (PSE Track #1)

Member Number: ______________________

Distribution Date: ______________________

Review Panel Member Name: ______________________

Criteria	Score(1)	Comments
Readability		
Focus		
Project Strategy		
Tone		
Count		
Length		
Continuity		
Comprehension		
Accuracy		
Conclusion		

Total Score: ☐

Note: (1) Score each criterion from 1 to 10, with 10 as the highest. Total possible points are 100; passing is 70% or 70 points.

Meaning of Scores on Executive Summary (PSE Track #1)[5]

Points	Meaning
1	Assign a 1 only when the person shows no awareness of and no performance on the criterion
2 to 3	Assign a 2-3 when the person barely addresses the criterion or performs at the absolute minimum level
4 to 5	Assign a 4-5 when the person indicates awareness of the criterion but fails to perform at a moderate level
6 to 7	Assign a 6-7 when the person indicates both awareness of the criterion and performs at a moderate level
8 to 9	Assign a 8-9 when the person indicates full awareness of the criterion and performs at an above average level
10	Assign a 10 only when the person demonstrates full command of the criterion

[5] The evaluation is based on the BOK …. NOT on what any one person thinks makes a good or bad executive summary!

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C. Evaluation of Oral Presentation for PSE Track #1

Oral Presentation Criteria

To the reader: *Please note that these criteria for the oral presentation are written in first person and present tense. The shifts in person and tense purposefully support your ownership, accountability and success in your submittal. Please contact your coach with any questions you have.*

The following guidance for delivering an oral presentation is for me so that I am more likely to succeed in passing this step in my quest for Professional member status in FCSI. As importantly, the information shared here supports the ongoing excellence of my oral communication with my own clients in ways that are more professional and effective.

The following criteria offer me support in my process of developing my submittal.

- Together these criteria represent a comprehensive yet detailed description of a professionally designed and delivered oral presentation for me to use as I develop my submittal.
- Each criterion provides a standard by which the review panel assesses my submittal.
- Each criterion provides a standard with which I may ask my coach or an associate to critique my draft submittal.

An Oral Presentation

I understand that an effective presentation presents the broad themes and major issues through clear, concise and comprehensive content delivered with integrity, persuasiveness and enjoyment. My presentation is simple and memorable, engages the audience and conveys what is most important. The overall objective is to stimulate the audience[6] to move to action as a result of the presentation.

The Detailed Criteria

The detailed criteria for a professional and effective oral presentation are:

- **Intent:** I begin my presentation by clearly articulating the central focus of the presentation and its relevance to the audience. My audience clearly understands the basis for the viewpoint I present.

- **Content:** I include only information relevant to the decision making by the audience, rank order the information into key points, and support the key points with facts and data. My presentation remains within the allotted time.

[6] Throughout the Oral Presentation Criteria, the "audience" is the one you describe in your completed Preparation Analysis Sheet. The Professional members who watch and evaluate your oral presentation act as members of your described audience.

- **Structure:** I ensure a logical flow in my presentation by organizing it into a beginning, middle and an end, with clear transitions among them. The beginning gives my intent and focuses the topic and the audience, the middle provides key points and supporting information, and the end leaves an impact.

- **Message:** I concisely express my core message throughout my entire presentation so there is no doubt in my mind or that of the audience as to this message.

- **Behavior:** My nonverbal cues (gestures, facial expressions, eye contact, posture, movement and appearance) project my positive image to the audience.

- **Presentation Materials:** My materials effectively support the understanding of my presentation by the audience. My materials are attractive, clear, well edited and easy to see from all parts of the presentation room. I avoid stepping between the presentation materials and the audience, thus creating a barrier that makes the materials less effective.

- **Words:** I use language appropriate for the audience. When I use acronyms, buzz words or jargon, I provide definitions and clarify. My sentences are short and focus on being to the point without unnecessary repetition. I avoid using statements that color my presentation in a patronizing tone and words that are imprecise or inexact.

- **Voice:** I modulate my voice to convey meaning such as emphasis, seriousness, conclusion of a point, question, and sympathy. These modulations contribute to my positive image.

- **Audience Connection:** My approach is to talk with rather than at my audience. I use good listening skills such as being empathetic, warm and genuine as I connect with the audience. I use eye contact throughout the room and anecdotes to which the audience can relate.

- **Impact:** I stimulate the audience to move to action on my recommendation(s) by the end of my presentation.

Evaluation Form for Oral Presentation (PSE Track #1)

Candidate Name/Member Number: ______________________________

Presentation Date: ______________________________

Review Panel Member Name: ______________________________

Criteria	Score(1)	Comments
Intent		
Content		
Structure		
Message		
Behavior		
Presentation Materials		
Words		
Voice		
Audience Connection		
Impact		

Total Score: [ ]

Note: (1) Score each criterion from 1 to 10, with 10 as the highest. Total possible points are 100; passing is 70% or 70 points.

Meaning of Scores on Oral Presentation (PSE Track #1)[7]

Points	Meaning
1	Assign a 1 only when the person shows no awareness of and no performance on the criterion
2 to 3	Assign a 2-3 when the person barely addresses the criterion or performs at the absolute minimum level
4 to 5	Assign a 4-5 when the person indicates awareness of the criterion but fails to perform at a moderate level
6 to 7	Assign a 6-7 when the person indicates both awareness of the criterion and performs at a moderate level
8 to 9	Assign a 8-9 when the person indicates full awareness of the criterion and performs at an above average level
10	Assign a 10 only when the person demonstrates full command of the criterion

[7] The evaluation is based on the BOK …. NOT on what any one person thinks makes a good or bad oral presentation!

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D. Submittals for PSE Track #2

FCSI-TA is aware that not all foodservice consultants deliver oral presentations on proposals or projects as a part of their work activities. The PSE Track #2 is designed to provide these consultants a suitable alternative to delivering an oral presentation to a review panel as required in PSE Track #1. By completing PSE Track #2 as an alternate, these consultants demonstrate an understanding and ability to communicate effectively through written and verbal methods.

The PSE Track #2 requires two submittals as described in the following subsections.

Request for Approval of Oral Presentation

With this submittal you identify an oral presentation and request approval for it based on the minimum specifications set forth below. These specifications maintain flexibility in the types of oral presentations that qualify to demonstrate your ability to deliver an oral presentation.

- The topic of your oral presentation must relate to your expertise in the foodservice industry.
- There must be clearly identifiable outcomes from your oral presentation and the outcomes must be measurable.
- You must be the prime author of your oral presentation.
- You must be the sole presenter of your oral presentation.
- You must deliver the oral presentation while a Senior Associate member of FCSI. Presentations completed prior to becoming a Senior Associate do not qualify.
- The audience (or client) must include at least three people not affiliated with your firm, and at least three of audience members must complete an evaluation of your presentation.
- The duration of the presentation must be a minimum of 30 minutes.
- You must have no real or perceived conflict of interest related to the PSE Track #2 with the audience (or client) contact.

Summary Report of Oral Presentation

This submittal provides you the opportunity to demonstrate your knowledge and skills in written communications by writing your summary report for your oral presentation.

The requirements for the submittal are very general in order to allow you flexibility in selecting your oral presentation.

- You have already received approval for the oral presentation that you are summarizing.
- You write a summary report on the approved presentation.

CPSTA provides the following statements as a guide for you when you write the summary report.

Audience:

The audience for your Summary Report is the CPSTA reviewers. Their need is to assess your ability to design an oral presentation and your skill in writing a summary report. They are sophisticated in the following:

- Designing and delivering oral presentations, and they know the BOK for Oral Presentations (i.e., Presentations for a Positive Impact by Sergay).
- Writing summary reports, and they know the BOK for Summary Reports (i.e., Summary Report by CPSTA).

Purposes:

There are two purposes for your Summary Report.

1. Present to the reviewers your ability to design an oral presentation as applied to your chosen oral presentation.
2. Demonstrate to the reviewers your skill in writing a summary report.

Subject:

The subject for the Summary Report is your design for the oral presentation for which you already requested and received approval. The reviewers want to learn about your design for the oral presentation and why you designed it that way. As examples:

- What were the characteristics of the audience for your oral presentation and how did you design the oral presentation to meet its needs?
- What was the intent of your oral presentation and how did you design the oral presentation to achieve the intent?

Your Summary Report includes at least four of the major design themes presented in Sergay for an oral presentation as applied to your oral presentation[8]

[8] Presentations for a Positive Impact by Sergay presents the major design themes in three main areas and several subareas as shown below. You may use any of these themes to satisfy this minimum requirement.

1. Preparation
    a. Intent
    b. Audience analysis
    c. Content
    d. Structure
    e. Message
2. Delivery
    a. Behavior
    b. Voice
    c. Words
    d. Audience connection
3. Impact

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E. Evaluation of Submittals for PSE Track #2

The following subsections show the criteria for assessing your submittals for the PSE Track #2.

Request for Approval of Oral Presentation Criteria

There are two levels of assessment that a review panel applies to your request for approval.

1. Your submitted oral presentation must meet the general minimum specifications set forth in Section D in order to qualify.
2. The audience (or client) evaluations collected for your oral presentation must equal or exceed the passing threshold using the methodology described below.

Type of Evaluations

1. Evaluations Administered by Organization

   Organizations often officially collect evaluations of an oral presentation after the presentation by having the audience submit an evaluation form. Oral presentations given at a conference or educational event are examples of this type.

   These forms usually ask the audience to rate the performance on several detailed dimensions such as:
   - the presenter's level of knowledge in the subject area
   - the level of organization of the visual material
   - the presenter's level of involving the class by encouraging questions and participation

   Also, the forms usually ask the audience to rate the performance on summary dimensions such as:
   - The seminar met my expectations
   - I would recommend this seminar to others like me

2. Evaluations Administered by FCSI-TA

   If evaluations are not administered by the organization, FCSI-TA Staff asks the contact person you identified for your oral presentation to collect evaluations of your presentation and FCSI-TA Staff receives sufficient completed evaluations. Oral presentations given in a business situation such as a client meeting or training session for a client are examples of this type.

FCSI-TA Staff requests the contact person to rate your presentation on the following two overall dimensions using a specific scale[9]:

- The presentation met my expectations for quality
- The presentation met my expectations for value received

Methodology for Scoring the Evaluations of Your Oral Presentation[10]

The methodology for assessing your level of performance on your oral presentation is based on the evaluations provided by the presentation's audience (or client).

There are two types of evaluations the audience (or client) may provide, and the methodology applied is different depending on which type of evaluations are received by FCSI-TA Staff.

1. Evaluations Administered by Organization

   These evaluations usually use rating scales with multiple categories, with the number of categories ranging from three to ten. FCSI-TA Staff assigns a numerical value to the rating categories used on the forms for your presentation, with a "1" given to the category for the lowest level of performance and an increasingly larger integer value given to all other categories progressing from lowest to highest. For example, in a rating scale with five categories, the numerical values are from "1" to "5".

   In order to standardize the methodology across as many rating scales as possible, FCSI-TA Staff uses this method for assigning numerical values even when the form itself has numerical values already assigned. For example, an organization's form may assign a "1" to the category for the highest level of performance. FCSI-TA Staff assigns instead a "5" so that the highest numerical value always represents the highest level of performance.

   FCSI-TA Staff calculates your overall average score by including the ratings for all summary dimensions and not including the ratings for any detailed dimensions. Your result is a pass for your oral presentation if your overall average is 70% or greater. For example, the passing threshold is 3.50 on a 5-point scale.

   Knowing that FCSI-TA is not able to predict the form of the evaluations used by every organization, the CPSTA develops alternative methods for analyzing the evaluation data when the form of the evaluations submitted don't fit into the standard forms described above. These alternative methods collect sufficient evidence to determine the effectiveness of your presentation as expressed by the audience.

[9] The rating scale has five categories, with a descriptive label on each end and one in the middle:
1 – strongly disagree; 2; 3 – neutral; 4; 5 – strongly agree

[10] This material provides you with the specific calculations CPSTA uses in determining whether you pass so that you are clear about the methodology.

2. Evaluations Administered by FCSI-TA

FCSI-TA Staff calculates your overall average score for the two summary dimensions. Your result is a pass for your oral presentation if your overall average is 70% or greater (i.e., at least a 3.50 on the 5-point scale).

Sample One: Request for Approval of Oral Presentation

X By submitting this form, I certify that I have read and understood the requirements and procedures for PSE Track #2.

X I certify that I have no real or perceived conflict of interest related to the PSE Track #2 with the audience/client contact listed below.

X I give permission to FCSI-TA Staff to contact the listed audience/client contact in order to obtain copies of the evaluations completed by the audience members, if they exist. If such evaluations do not exist, FCSI-TA may request feedback directly from the audience/client contact in order to assess the quality level of my oral presentation and the value of my oral presentation to the audience.

77777777	December 29, 2013
FCSI Member #	**Date of Form Submission**
October 30, 2013	Thirty (30) Minutes
Date of Oral Presentation	**Duration of Presentation (in Minutes)**
The XYZ Group	Joan Doe
Audience (Name of Org/Group)	**Audience/Client Contact Name**
000 - 000 – 0000	Three (3)
Contact's Telephone Number	**Number of Audience Members**

Describe the topic of your oral presentation below:
The flow diagram and block layout of the main kitchen food services for a teaching hospital with 800 beds

List the desired outcome(s) of your oral presentation below:
Client approval for:
1. Flow of material and personnel path within the kitchen area (a forward flow)
2. Clear and defined separation of soiled and clean paths (no cross contamination).
3. Block schematic spaces within the functional program requirements (appropriate space size and adjacencies).

Sample Two: Request for Approval of Oral Presentation

X By submitting this form, I certify that I have read and understood the requirements and procedures for PSE Track #2.

X I certify that I have no real or perceived conflict of interest related to the PSE Track #2 with the audience/client contact listed below.

X I give permission to FCSI-TA Staff to contact the listed audience/client contact in order to obtain copies of the evaluations completed by the audience members, if they exist. If such evaluations do not exist, FCSI-TA may request feedback directly from the audience/client contact in order to assess the quality level of my oral presentation and the value of my oral presentation to the audience.

66666666	June 9, 2014
FCSI Member #	**Date of Form Submission**
March 17, 2014	Forty (40) Minutes
Date of Oral Presentation	**Duration of Presentation (in Minutes)**
A Foodservice Management Course	Joan Doe
Audience (Name of Org/Group)	**Audience/Client Contact Name**
000 - 000 – 0000	Thirty five (35)
Contact's Telephone Number	**Number of Audience Members**

Describe the topic of your oral presentation below:
The presentation provided an overview of the various aspects of Foodservice Consulting including business consulting and design services. To exemplify the work I presented case studies from several recent projects in high tech, health care and higher education. Specific examples included operational and design challenges, issues related to equipment selection, permitting and space planning.

List the desired outcome(s) of your oral presentation below:
- Instill an understanding of the specialized expertise foodservice consultants offer
- Demonstrate the value the students would receive by engaging a foodservice consultant to solve operational, equipment and design issues
- Interest the students in foodservice consulting as a viable career path
- Introduce the FCSI organization as a resource which should be considered when choosing a foodservice consultant
- Offer resources for future reference

Summary Report of Oral Presentation Criteria

To the reader: *Please note that these criteria for the summary report are written in first person and present tense. The shifts in person and tense purposefully support your ownership, accountability and success in your submittal. Please contact your coach with any questions you have.*

The following guidance for writing a summary report is for me so that I am more likely to **succeed in passing** this step in my quest for Professional member status in FCSI. As importantly, the information shared here supports the ongoing excellence of my **written communication and oral presentations** in ways that are more professional and effective.

The **following criteria** offer me support in my process of developing my submittal:

- Together these criteria represent a comprehensive yet detailed description of an effectively written summary report that documents my ability to design an oral presentation. This is **for me to use as I write my submittal**.
- Each criterion provides a standard by which the **reviewers assess my submittal**.
- Each criterion provides a standard with which I may ask **my coach or an associate to critique my draft submitta**l.

I am aware that my summary report **condenses** a wide range of information about my oral presentation into a short document so the CPSTA reviewers can comprehend its major points in a brief reading. I understand that an effective summary report **presents the major points** through clear, concise and comprehensive content so the CPSTA reviewers can determine whether my written report **demonstrates a passing level of competence** in writing a summary report **and** designing an oral presentation.

The Detailed Criteria

The detailed criteria for a professional Summary Report of Oral Presentation:

Evaluation Criteria	Used to evaluate:
Readability: I write a summary report that is appropriate for the <u>two specified purposes</u> and for the <u>CPSTA reviewers</u> by using language and concepts aligned with the reviewers' <u>sophistication in the subject matter</u>.	My skill in writing a summary report
Tone: I am aware that the tone of an effective summary report conveys to the CPSTA reviewers an implied meaning about my professionalism. My summary report feels <u>objective and positive, yet honest and genuine</u>, to the reviewers.	My skill in writing a summary report

Evaluation Criteria	Used to evaluate:
Focus: I focus my summary report on the CPSTA reviewers' needs by including only information which supports my major points and is relevant to the reviewers' needs.	My skill in writing a summary report
Reported Themes: I include at least four major design themes in my summary report that are appropriate for my type of oral presentation. I choose details for each theme that support the theme's relevance to my oral presentation.	My ability to design an oral presentation
Judgment: The major design themes that I include demonstrate my sound judgment about the priority of their importance for my type of oral presentation.	My ability to design an oral presentation
Continuity: My summary report flows in a logical and smooth manner without jumping from one point to another in a choppy fashion. I am aware that an effective format shows a clear connection from beginning, to middle, to completion/end.	My skill in writing a summary report
Comprehension: My summary report clearly conveys the meaning of my summary report to the CPSTA reviewers who only skim the document. I use bullets and bolding of selected words/phrases to emphasize my points.	My skill in writing a summary report
Accuracy: I ensure there are no errors in spelling, grammar and punctuation.	My skill in writing a summary report
Length: My summary report is just long enough to present my major points, but no longer than three pages.	My skill in writing a summary report
Conclusion: I end my summary report with relevant conclusions which support the CPSTA reviewers' decision making about my skill in writing a summary report that documents my ability to design an oral presentation.	My skill in writing a summary report

Sample One: Summary Report of Oral Presentation

Our firm provided food service **facility design services** for a **specialty hospital** in a medical centre. Early on, our firm presented the client a **schematic design** for the main kitchen. At the conclusion of the oral presentation, our firm wanted the **client's approval to proceed**.

This report provides details about the project and about our firm's decisions on the content of the presentation in order to gain the client's approval.

Project Description:

This **specialty hospital showcases a healthcare design with state of the art food services**. In brief, the hospital:

- Accommodates 800 beds for single patient rooms,
- Provides meals to both admitted hospitalized patients and registered patients, including emergency, dialysis and other day surgery patients,
- Serves 345,000 ambulatory patients, 22,000 inpatients, and 65,000 emergency patients each year, and
- Serves as a teaching facility.

With respect to the food services functional program, the architectural background of the main kitchen depicted an overall programmed area totaling 31,000 sf.

The main kitchen supports the following elements within the functional program:

- 65% of outsourced/prepared products,
- 35% of meal production on site,
- Automated Guided Vehicles (AGVs), and
- Meal distribution via both a room service method and a hot cart, mass–distribution method.

Oral Presentation:

<u>Intent</u>

Our focus was to gain the client's approval by demonstrating that our firm's schematic design satisfied the client's needs.

The **desired outcome** for the presentation was the **client's approval for**:

- Flow of material and personnel path within the kitchen area (**a forward flow**),
- Clear and defined separation of soiled and clean paths (**no cross contamination**), and
- Block schematic spaces within the functional program requirements (**appropriate space size and adjacencies**).

The Audience

The client was represented by:

- a **principal** (material management consultant),
- the **project manager** (food service dietitian), and
- a **CAD technical manager**.

They needed to review our firm's schematic design in order to confirm collectively that the design satisfied the hospital's operational program through proper flow, adjacencies and space allocation.

Delivery

Our firm structured its presentation around **two presentation drawings**.

1. A–100: Main Kitchen Flow Diagram
2. A–101: Main Kitchen Block Layout

Our firm engaged the client through a **presentation and a subsequent Q&A session** about the main themes shown on the drawings. A summary of these themes are provided below.

- Overall flow: the layout depicts a food service flow path traveling from north to south within the background layout zone. Based on the architectural background, two zones (i.e., north and south) were achieved, leaving a central corridor flowing east to west within the main kitchen as a building code related emergency route.

- Functional activity areas for north zone: the combined areas include all functional activity areas from receiving through therapeutic kitchen as well as the food service supervisor's offices.

- Flow for north zone: food service goods when received enter the north receiving area via automated guided vehicles. Refrigerated and frozen goods are then transferred into the walk-in refrigerators and freezers from a back loading end. Dry goods are taken to a dry storage room also from a back loading entrance. From here on goods are brought forward from the internal front entrances of the storage areas and move into the controlled preparation zone. The flow then moves into an ingredient control and mise en place refrigerator, or directly into the rethermalization/hot production kitchen. Some meals are taken into the blast chilling zone for chilling and holding. Special diet items are produced in the therapeutic kitchen.

- Functional activity areas for south zone: the combined areas include all functional activity areas from meals assembly through cart and pot/pan washing as well as access to vertical transportation.

- Flow for south zone: The food service flow continues in a forward manner. On site produced or outsourced prepared meals enter directly into the meals assembly area. This area has three meal service lines as it must cater for the two meal distribution methods. South of this zone is the clean meal carts and clean dish carts parking and holding. South of the clean holding zone is the dish-washing area and cart washing area. These are supported by a logically placed pot/pan washing room. Further south of this space is the waste holding area as well as parking for soiled carts. Based on the design there is a clear separation of soiled and clean and at no time are there means for any cross contamination.

<u>Impact</u>

The **client** learned about and **agreed** with the following statements.

- The **flow diagram provides a continuous forward flow and does not permit backward movement that creates concerns for cross contamination**. The flow also supports the required HACCP program.

- The **flow diagram provides a clear and defined separation for the movement of clean goods and services versus soiled cart movement and waste**.

- The **block layout depicts all of the functional activity areas as defined within the facility functional program**. Room adjacencies and connections are respected within the design. More importantly all room areas (sf) are as specified or well within the five percentage differential as stipulated in the food service functional program.

Conclusion:

Our oral presentation **successfully informed the client** about our design for the functional activity areas, their adjacencies and their areas, thus **giving the client the confidence to approve our design**. Our firm accomplished this through an interactive presentation based on project drawings and on such key presentation design considerations as the **presentation’s intent, audience, delivery and impact**.

Sample Two: Summary Report of Oral Presentation

The Design of My Oral Presentation

This report **summarizes** the design of a 40-minute **oral presentation** I delivered to a course of college students nearing graduation. This report's subject is **what I presented** and **why I did so**, and its organization is **structured by themes** well-known as important for a successful oral presentation.

- The audience
- The intent
- The delivery
- The content and its structure

The report begins with background on the presentation's context and ends with a conclusion about its success.

<u>Background</u>

Professor XXXXXX, at The University of California at ZZZZZZ, asked that **I introduce** the students in her Food Systems Organization & Management course to **my work as a foodservice consultant**. Her upper division course imparts a broad overview of food systems by exposing the students to a wide range of perspectives, and prepares the students to become managers, leaders and innovators in the area of foodservice and hospitality.

<u>The Audience</u>

My audience included the **35 students and teaching assistants** in the upper division course who were nearing graduation and considering their career track. Their backgrounds were broad, and their career goals diverse. Some were destined for a direct role in foodservice while others an indirect one.

<u>The Intent</u>

My intent was **to spark the interest of the students in the broad area of foodservice consulting, firstly to recognize the need and secondly as a possible career.**

The presentation supported this intent by focusing on the following main goals.

- Instill an understanding of the **specialized expertise** foodservice consultants offer
- Demonstrate the **value** the students would receive by engaging a foodservice consultant to solve operational, equipment and design issues
- Interest the students in foodservice consulting as a viable **career path**
- Introduce the **FCSI organization** as a resource which should be considered when choosing a foodservice consultant
- Offer **resources** for future reference

The Delivery

Standing before the group, I delivered the presentation and answered questions during and after it. In order **to engage the students**, I asked for their input at regular intervals during the presentation. Leading questions included:

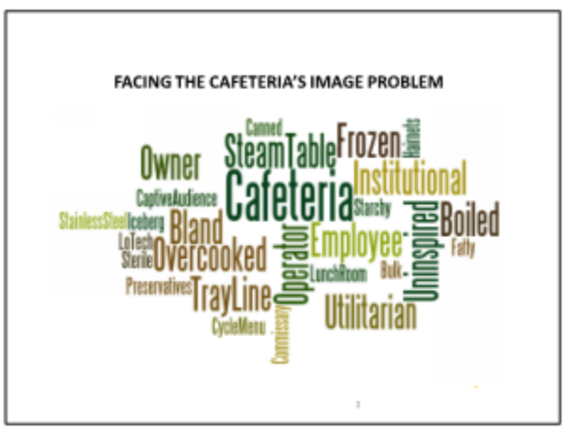
- Was anyone aware of the profession called Foodservice Consultant?
- Has anyone done any design or business analysis as part of your class work?
- What were some of your career goals and has anyone considered working as a foodservice consultant?

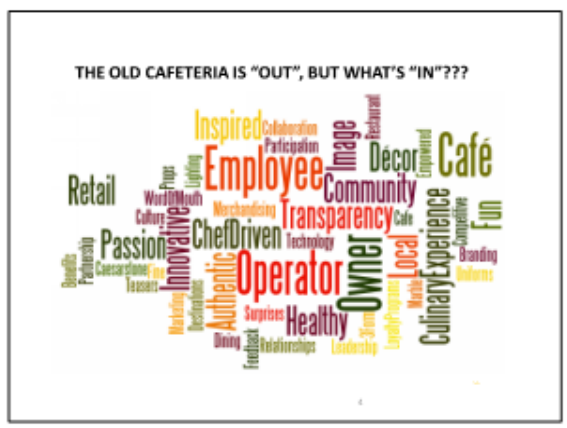
As a backdrop to my oral presentation, I projected select custom graphics, project photos, plan views and sample equipment images via a PowerPoint presentation.

The Structure and Content

The presentation was structured to capture the interest of the audience. In order to achieve my goals of engagement, I used a broad palette. The following were the main sections of the presentation with their purposes in parentheses.

1. **Opening Graphic: Dining Facilities - Yesterday and Today *(To encourage dialogue with the audience)***
   Word cloud diagrams (www.wordle.net) exemplified the images and associations with old fashioned institutional dining versus the contemporary approach most clients are seeking today. In order to develop audience connection, I opened with the slide on the left, and asked the audience to define what constitutes a dining facility today. Then I went on to show the second slide.





2. **Sectors Served *(To show the sectors needing the services)***
   To further capture interest and explain the broad scope of the profession, this section presented a general review of the various foodservice sectors. These include health care, B & I, correctional, higher education, retail, public venues, theme parks and any other venue having foodservice operations and facilities.

3. **Industry Partners *(To show the relevant players)***
   Project participants may include: Owners, Chefs and Operators, Management Advisory Service and Design Professionals, Developers, Construction Companies, Environmental Health and other Code Authorities - to name a few.

4. **Project / Client Case Studies *(To show memorable, anecdotal examples of relationships in the field)***
   This section emphasized specific client needs on each project, type of team and particular challenges faced. Actual examples of services were presented such as design and business consulting.

5. **Relevant Resources *(To provide ongoing value and to further the connection via social media)***
   a. FCSI (www.fcsi.org)
   b. Foodservice Technology Center (www.fishnick.com)
   c. Health Care Without Harm (www.noharm.org)
   d. My contact information

6. **Questions and Answer Session *(To gather last impressions and address any specific questions)***
   A brief, open question and answer session brought out further interest and allowed a more personal and less structured conclusion. Students asked about the learning path for becoming a consultant and about referrals for internships.

7. **Handouts *(To provide the students with take-away materials)***
   Following the presentation I shared a handout of the PowerPoint slides with the audience.

Conclusion

Based on the **positive feedback** at the event and subsequent **positive evaluations**, the presentation was **successful: it introduced the audience** of advanced students **to the broad world of foodservice consulting.** I delivered an **effective oral presentation** by focusing on its audience, intent, delivery and content.

Evaluation Form for Summary Report of Oral Presentation (PSE Track #2)

Member Number: ______________________

Distribution Date: ______________________

Review Panel Member Name: ______________________

Criteria	Score(1)	Comments
Readability		
Tone		
Focus		
Reported Themes		
Judgment		
Continuity		
Comprehension		
Accuracy		
Length		
Conclusion		

Total Score: $\boxed{}$

Note: (1) Score each criterion from 1 to 10, with 10 as the highest. Total possible points are 100; passing is 70% or 70 points.

Meaning of Scores on Summary Report of Oral Presentation (PSE Track #2)[11]

Points	Meaning
1	Assign a 1 only when the person shows no awareness of and no performance on the criterion
2 to 3	Assign a 2-3 when the person barely addresses the criterion or performs at the absolute minimum level
4 to 5	Assign a 4-5 when the person indicates awareness of the criterion but fails to perform at a moderate level
6 to 7	Assign a 6-7 when the person indicates both awareness of the criterion and performs at a moderate level
8 to 9	Assign a 8-9 when the person indicates full awareness of the criterion and performs at an above average level
10	Assign a 10 only when the person demonstrates full command of the criterion

[11] The evaluation is based on the BOK …. NOT on what any one person thinks makes a good or bad summary report!

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Appendices

1. Forms for PSE

The following forms are provided for your use as you progress toward passing the IKE and PSE.

- Preparation Analysis Sheet (for PSE Track #1)
- Personal Release (for PSE Track #1)
- Request for Approval of Oral Presentation (for PSE Track #2)

Preparation Analysis Sheet (Sergay, pg 9)

Presentation Focus			
Subject			
Objective			
Actions to be taken by Audience			
My Perspective			
Benefits for the Audience			
Audience Details			
Size		Gender mix	
Education levels		Work areas	
Hierarchical levels		Age profile	
Decision making powers		Influencers	
Logistics Details			
Location		Room size	
Seating layout		Equipment	
Time and its impact on mood		Time to set up equipment	
Screen visibility		Audience Visibility	
Lighting on presenter		Podium or free-standing	
Stationary or lapel microphone		Roving microphone	

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Personal Release

In connection with my oral presentation of the PSE Track #1 with FCSI-TA, I hereby approve my oral presentation to be video recorded in order to be evaluated by review panel members at remote locations.

Please select whether or not you wish to receive a copy of your video recorded presentation:

- ☐ I want to be sent a copy of the video recording at the same time FCSI-TA Staff sends me the results of my presentation.

- ☐ I do not want to receive a copy of the video recording at the same time FCSI-TA Staff sends me the results of my presentation.

Please select whether or not the video recording can be used by FCSI-TA for training purposes:

- ☐ I approve of CPSTA using the video recording of my presentation to train additional Professional members to become evaluators.

- ☐ I do not approve of CPSTA using the video recording of my presentation to train additional Professional members to become evaluators.

____________________ Signature	____________________ Date
____________________ Name (printed)	____________________ Telephone Number

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Request for Approval of Oral Presentation

You complete this form as part of PSE Track #2 and submit to FCSI–TA Staff.

- ☐ By submitting this form, I certify that I have read and understood the requirements and procedures for PSE Track #2.
- ☐ I certify that I have no real or perceived conflict of interest related to the PSE Track #2 with the audience/client contact listed below.
- ☐ I give permission to FCSI-TA Staff to contact the listed audience/client contact in order to obtain copies of the evaluations completed by the audience members, if they exist. If such evaluations do not exist, FCSI-TA may request feedback directly from the audience/client contact in order to assess the quality level of my oral presentation and the value of my oral presentation to the audience.

____________________	____________________
FCSI Member #	**Date of Form Submission**
____________________	____________________
Date of Oral Presentation	**Duration of Presentation (in minutes)**
____________________	____________________
Audience (Name of Org/Group)	**Audience/Client Contact Name**
____________________	____________________
Contact's Telephone Number	**Number of Audience Members**

Describe the topic of your oral presentation below:

____

____

List the desired outcome(s) of your oral presentation below:

____

____

____

____

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2. Appeal Policy

Council for Professional Standards – The Americas (CPSTA)

Appeal Policy to CPSTA for PSE Track #1 Oral Presentation

In the event a candidate receives a “not pass” result on the PSE Track #1 Oral Presentation, the candidate may appeal the decision as follows.

1. A candidate has 60 days from the date on which the official result is received to file an official appeal to CPSTA. The candidate sends a written letter to the Director of Education at Headquarters. The candidate’s written appeal must state the reason the candidate believes the “not pass” result doesn’t accurately indicate the candidate’s level of performance on the specific presentation. The candidate’s statement is the only basis on which CPSTA considers the appeal.

2. Once a written appeal is received by the Director of Education, CPSTA identifies an appeal review panel without any overlapping members from the original review panel. The Direction of Education provides the appeal review panel with the following materials:
   - the original PSE Track #1 Executive Summary document on which the original presentation was based
   - the candidate’s original Preparation Analysis Sheet which describes the audience for the presentation
   - the video recording of the candidate’s presentation
   - the scoring sheets for the appeal review panel

3. The appeal review panel evaluates the material provided and scores the candidate’s performance based on the video recording. In addition, this panel is required to provide comments describing the deficiencies/deviations from the published scoring criteria that caused any scoring point to be less than 10.

4. CPSTA averages the total scores on all score sheets (i.e., those from the original review panel and those from the appeal review panel) and determines whether the candidate passes, with an average score of 70 percent or above required for passing. CPSTA informs FCSI-TA Staff about the result.

5. FCSI-TA Staff informs the candidate about the result and provides the appeal review panel’s comments within 30 days from the date on which the candidate’s appeal is received.

6. The FCSI-The America’s Board of Trustees may, at its sole discretion, offer another level of appeal based on criteria specified in advance by the Board.

FCSI

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3. Body of Knowledge

The following table describes the Body of Knowledge that is the basis for the following versions of the PSE:

1. PSE (2014)

Body of Knowledge for PSE (2014)

Title (see notes)	Author	Edition	Publisher	Portions	Exam
Executive Summary[1]	CPSTA	2014	FCSI-TA	All	PSE Track #1
Summary Report[1]	CPSTA	2014	FCSI-TA	All	PSE Track #2
Presentations for a Positive Impact[1]	Sergay	1st, 2009	FCSI-TA	All	PSE Track #1&2
Notes: 1. Material included in the Packet for Examinations					