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Assessment Template

# **Quantitative Data**

Useful data to develop a data baseline:

# Select the most recent fully completed school year and provide the following documentation:

* P & L (or document approximating P&L) for the designated year
* Menu – breakfast, lunch, snacks with explanation of how menu items are served (i.e. bundled, a la cart, etc.) for the designated year
* All purchases, i.e., the actual receipts and copies of invoices/paperwork for the designated year including designation for local items that are not specified on the receipt
* Labor costs, including benefits for the designated year
* All cafeteria and kitchen utilities that are paid for under the F&B budget (if not broken out in the P&L) for the designated year
* Food and labor budget for the current year
* Equipment spend the past five years
* Any surveys with results
* Any written goals for food service program
* All KPI’s (Key Performance Indicators) for the past 5 years
* Strategic plan for food service program
* Strategy plan, wellness plan, or operating principles (or any larger plan or vision for the food service program)
* Job descriptions and organizational chart for kitchen staff as well as custodians/janitors that clean the cafeteria including length of employment tenure to date for the designated year
* All rules by all governing bodies (i.e. county sanitation rules, HR rules, union rules, etc.)
* List of commodities for the designated year and the upcoming year
* List of any grants to purchase certain foods for the designated year and upcoming year
* Production schedules including participation numbers and overproduction amounts; If no production schedules then send participation numbers (by day or month) and overproduction amounts if you have it. Participation numbers should include number of meals served to students as well as teachers and other adults (by day or month) so that we are able to get the total number of meals served. Attendance, enrollment, or some way to determine how many total students in school each month.
* Plate waste
* Recipes to include cost and nutritionals
* Architectural drawings of kitchen including equipment and storage
* Existing contracts with vendors for upcoming school year (milk, bread, etc.)
* Attendance or absenteeism data from the previous school year(s) broken down by month

Beyond Green Partners reviews data and provides an assessment of the data.

**Qualitative Data**

Conduct (virtual) interviews with key stakeholder groups. The intended purpose is to gain discoveries needed from all perspectives.

1. Food service director
2. Teachers
3. Cooks
4. Parents
5. Students
6. Administration
7. Community members, partner organizations

Possible questions:

• What do you like about the food served at school? What don’t you like?

• What meals do you like? What do you like about them?

• What meals don’t you like? What don’t you like about them?

• If you had a magic wand what would you want to see in the cafeteria?

• How are you school lunches different/same as how you eat at home?

• Is the food at home better or worse than the food at school?

• At home do you regularly eat fruits and/or vegetables?

• If you don’t eat at school, why not?

• If you do eat at school, why? How often?

• Do you prefer milk or water with your meals?

• When or how do you decide if you will be eating at school?

• Do you know the names of the staff who prepare the school food?

• Do you think your portions are too big or too small? Describe a meal where the portion is too big/too small.

• If you are throwing any food away, why?

• Do you know how to recycle? Do you recycle at home?

• Would you like to ever volunteer in the kitchen either helping prepare or serve the food?

• Where does your family purchase their food?

• Do you garden at home or at school?

• Do you cook at home? If so, what do you like to cook?

# Assessment Areas

**Collect and Evaluate Data** (for operational efficiency)

Key areas and potential questions:

* **Overproduction**: What’s left over after the days service? Do they weigh or measure or track the leftovers in any way? What’s in coolers and freezer that are left overs? Do the leftovers really get used/re-utilized?
* **Food waste :** Kitchen scraps - Are they wasteful?
* **Plate waste:** Is food eaten? Is food measured?
* **Production records:** Do they have them? Do they follow them? Or are they running on tribal knowledge?
* **Participation numbers :** what are their daily, monthly, annual averages for all types of customers? How do they track and report these numbers?
* **Costed recipes:** Are recipes costed? When were they costed? Do the cooks know recipe costs or are they locked away in a vault?
* **Inventory:** Does the manager take inventory? Who accepts/receives and checks deliveries?
* **Profit and loss:** What is the current reality compared to the budget? Who made the budget? Is the budget realistic? Are they currently over budget or under budget? Are they happy with where they are compared to budget? If they are over budget, what are their ideas to be under budget?
* **Recycling and composting:** Do they do this? Who do they use? If yes, where does this initiative come from and what do people think about this initiative? If not, do they want to?
* **Energy and water consumption:** Do they pay the bill? Do they care about this? Why or why not?
* **Menu size:** If more than two or three items, why do they have a big menu? How does it help their business and what evidence do they have that it helps their business?
* **PO system:** How old is it? What does it track? Do they like all it tracks or what do they wish it would track?

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| What’s working? | | |
| What are the staff/stakeholders saying? | **What does the data say?** | **What observations were made?** |
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| What’s NOT working? | | |
| What are the staff/stakeholders saying? | **What does the data say?** | **What observations were made?** |
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**Menu** (for food quality)

Key areas:

* **Fresh vs non-preferred:** What is cooked from scratch? What isn’t? What does the cooler look like compared to freezer and pantry? Are they making items like pancakes or buying a mix or buying in a bag? What are they promoting compared to what they are doing?
* **Local**: Do you see any local food? Do you see any marketing of local food?
* **Meals cooked from scratch:** What is cooked? What is not cooked? What are they promoting compared to what they are doing?
* **Menu Format:** What is the menu cycle, how frequently does it change, What meals are served, Who is menu distributed and shared with the community (website, newsletter, etc)
* **New menu item introduction process:** How many new items do they do/when/why/how? Do the staff think it works.
* **Nutritionals:** Is there a dietician on staff? How are nutritionals for recipes generated and maintained?
* **Taste tests:** How do they introduce menu items? How do they know customers will like the food?
* **Feedback loop:** How does feedback travel from customer to staff?
* **Meal service:** Is it set up on time? How does the service flow? How long do students/customers stand in line? Does the food look good? Does the food taste good? How much food is leftover at the end of service?
* **Food quality:** Are the raw ingredients any good? Indicators: what cooking oils are in inventory? where is meat/poultry and seafood being sourced from? How frequently are they ordering produce; look inside the walk in and assess produce.
* **Kitchen design:** How well does the flow work? Do they have the needed equipment in the best place?
* **Storage space:** Is there enough? Is it organized?
* **Amount of food on hand:** What do they have too much of?

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**Training/Leadership** (for team productivity)

Key areas:

* **New staff:** How long have people been in their jobs? What is the turnover rate? What training do new staff receive?
* **Existing staff:** What training do staff receive? How do they stay relevant in their jobs?
* **Teamwork:** Do they ever work as a team? Is there any “swarming” to accomplish tasks?
* **Culinary skills** (i.e. knife skills, reading and following a recipe, scaling a recipe, mise en place, clean as you go, set-up on time, customer service, etc.): What is the team’s ability to think ahead? What is the team’s ability to cook from scratch?
* **Staff awareness of key data** (i.e. cost of recipe, production record, accurate portioning, current performance goal status, etc.): What do they measure? Where are they housed?
* **Time management :** How would you classify their time management
* **HR/Personnel :** Is the staff unionized? If so, what is kitchen staff’s role in the union; is there a union rep connected with kitchen? How are personnel issues handled and does the manager frequently or rarely have to talk to employees about HR related issues.
* **Commitment** : Do you track called-off/sick days for your employees? If so can we see those records?
* **Purchasing and Procurement:** Who does the ordering? Is there a procurement process, i.e. bid process? Explain the flow of invoices within your operation – understand relationship between Kitchen- Purchasing Department – Accounting Department? How are vendors selected? How many vendors do they order from? Is the contract strict or what are the ordering rules?
* **On-time cooking:** How far in advance is food made and ready? Does it sit in warmers or go from the pan to serving?
* **Job satisfaction:** Are staff being led by strong leaders or are they operating on tribal knowledge?

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