



**KIDS' SAFE &  
HEALTHFUL  
FOODS PROJECT**



# Serving Healthy School Meals

Financing strategies for school food service



The Kids' Safe and Healthful Foods Project is a collaboration between The Pew Charitable Trusts and the Robert Wood Johnson Foundation that provides nonpartisan analysis and evidence-based recommendations on policies that impact the safety and healthfulness of school foods. For more information, see [healthyschoolfoodsnow.org](http://healthyschoolfoodsnow.org).

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# Kitchen Infrastructure, Training, and Equipment in Schools Workshop

July 28-30, 2013

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## Overview

More than 75 people from 31 states attended a workshop hosted by the Kids' Safe and Healthful Foods Project to discuss how schools can meet and exceed school meal nutrition standards by overcoming budget constraints and finding the resources to update their kitchens and cafeterias. The Kitchen Infrastructure, Training, and Equipment in Schools Workshop, which took place in Chicago July 28-30, 2013, included insights of food service directors, school administrators, industry representatives, nonprofit organizations, foundations, and financiers.

Collaboration, entrepreneurship, resourcefulness, and creativity were cited as crucial components of a program's success in a time of budget tightening. School districts are thinking about school foods in a new way that places a priority on health, but they also need to find innovative financing strategies to pay for the equipment and infrastructure changes they need to put healthy foods on the lunch tray.

To be successful, the attendees decided that the first step is to make the business case for upgrades and improvements. Participants also emphasized the need for planning and evaluation. Successful districts created business plans that include near-term (to meet requirements and make relatively minor improvements) and long-term (to make more substantial improvements) financing and procurement strategies that are integrated over time. They also researched and evaluated options for obtaining equipment and/or upgrading infrastructure, such as leasing equipment, buying and selling used equipment, securing equipment donations, and getting price quotes from multiple sources.

## Background

In January 2012, the U.S. Department of Agriculture, or USDA, finalized its updated nutritional standards for school meals in keeping with the Healthy Hunger-Free Kids Act of 2010 (Public Law No. 111-296), which reauthorized the school meal programs and placed an emphasis on the need to improve access to healthy foods in schools. As a result, schools are striving to serve meals within calorie ranges that include more fruits, vegetables, whole grains, and low-fat dairy options. School districts without kitchens or with aging kitchens lack the basic infrastructure and tools necessary to prepare, serve, and store healthier foods. Although some federal funding opportunities have been made available in recent years, and some schools are pioneering creative avenues for securing these essential assets, many schools struggle to find the resources to bring kitchens and cafeterias in line with current needs.

The Kids' Safe and Healthful Foods Project, or KSHF, a joint initiative of The Pew Charitable Trusts and the Robert Wood Johnson Foundation, hosted the workshop to discuss how schools can overcome budget constraints and find the resources to update their kitchens and cafeterias to meet or exceed the nutrition standards for school meal programs. All students in schools that participate in the National School Lunch Program and the School Breakfast Program, regardless of family income, have access to these meals. Children from low-income families are eligible for free or reduced-price meals. The program receives federal funding and is subject to the rules set by the USDA's Food and Nutrition Service.

At the workshop, attendees—who included food service directors, school administrators, financiers, and representatives of industry, nonprofit organizations, and foundations—clarified the needs for kitchen equipment, infrastructure, and food service training and shared and developed strategies for addressing them.

Featured presentations during the workshop included the following:

- Maureen Spill, Ph.D., of the Kids' Safe and Healthful Foods project, shared key findings from the *Kitchen Infrastructure, Training, and Equipment Survey* (or KITS survey) conducted by Mathematica Policy Research on behalf of the project.
- Janey Thornton, Ph.D., USDA deputy undersecretary for food, nutrition, and consumer services, offered insights about the agency's school food programs.
- Alyssondra Campaigne, of Engage Strategies, provided an overview of important takeaways from case studies on various school districts' programs.
- A panel of stakeholders discussed success stories from their experiences in securing resources for school kitchen equipment, infrastructure, and training.

Participants engaged in three facilitated small-group breakout sessions to discuss specific challenges and opportunities for addressing schools' needs.

## Summary of discussion—July 28, 2013

### Welcome

Jessica Donze Black, director of the Kids' Safe and Healthful Foods Project, and Erik Olson, senior director of food programs for The Pew Charitable Trusts, welcomed participants and thanked them for attending the workshop. Donze Black explained the project's role of providing nonpartisan analysis and evidence-based recommendations to make sure that all foods and beverages sold in U.S. schools are safe and healthful. Specifically, the project is working to ensure that the USDA adopts science-based nutrition standards for snack foods and beverages served and sold in schools; that it develops and implements rigorous school food safety policies; and that schools have the resources they need to train cafeteria employees and replace outdated and broken kitchen equipment.

The project recently conducted a survey of school food authorities, or SFAs,\* to identify their perceived needs in meeting the updated standards for the National School Lunch Program. (This survey is also known as the KITS study.) The survey results underscored a significant lack of resources available to schools to meet these standards. The primary purpose of the workshop, Donze Black explained, was to gain insights from a diverse group of stakeholders about the study's main findings and determine how best to help schools succeed in achieving the standards. She encouraged participants to share their perspectives and ideas throughout the workshop.

### Kids' Safe and Healthful Foods Project survey: Current landscape and barriers to serving healthy food

Maureen Spill, Ph.D., a senior associate with the project, provided an overview of the survey's methodology and key results. The survey was administered to SFAs in 50 states and the District of Columbia from August to December 2012 (the period when SFAs were asked to implement updated standards). Respondents were kept

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\* A school food authority is the local administrative unit that operates the National School Breakfast and School Lunch Programs for one or more school districts.

anonymous to alleviate any concerns about providing truthful answers. Questions focused primarily on readiness for and challenges to meeting updated requirements, adequacy of existing kitchen equipment and the need for new equipment, changes and upgrades in kitchen infrastructure, and staff training needs. Key findings were examined for statistically significant differences among SFA subgroups based on size, community type, region, and poverty level.

A more in-depth overview of the KITS study results was provided over the course of the workshop and is highlighted below.

## Summary of discussion—July 29, 2013

### Insight from USDA

Jessica Donze Black introduced Janey Thornton, Ph.D., USDA deputy undersecretary for food, nutrition, and consumer services. In this role, Thornton has been responsible for improving the health and well-being of Americans by expanding access to nutritious, affordable food and providing dietary guidance, nutrition policy coordination, and nutrition education across USDA's 15 nutrition assistance programs.

Thornton offered a historical overview of the school meal programs. In 1946, President Harry S. Truman signed the National School Lunch Act, authorizing the National School Lunch Program and providing a federally assisted meal program to students in need. In 1966, President Lyndon B. Johnson signed the Child Nutrition Act, which established the School Breakfast Program and extended the reach of the existing program. Eventually, school meal programs expanded again to include after-school snack programs, supper programs, and summer meal programs. By providing access to free or reduced-price nutritionally balanced meals, these programs provide students with the nourishment needed for learning.

The standards for the school meal programs are periodically updated to reflect the latest nutrition guidelines. When the updated standards went into effect in 2012, negative media attention about portion sizes and students' acceptance of the new menus affected the reception of the standards in some regions. Thornton indicated that perceptions of the standards are improving with time as communities begin to understand the reasons for the updated standards. She also noted that efforts are underway to explain them to superintendents and school boards across the country, set expectations for school meal programs, and address and alleviate any concerns that may have been voiced by parents, students, or members of the community.

Thornton reported that school districts across the country have faced challenges in implementing the updated standards. Old or insufficient kitchen equipment, for example, has hindered schools' ability to meet them. Although the National School Lunch Program received \$100 million from the American Recovery and Reinvestment Act of 2009 and \$25 million from fiscal 2010 appropriations, this funding, which is allocated through a competitive grants program, represents a fraction of what school districts need to upgrade their kitchen equipment and infrastructure and to adequately train staff. Thornton emphasized that developing strong relationships between school districts and members of the community is essential to meeting these challenges. She encouraged workshop participants to share ideas so that successes can be replicated and expanded across the country.

### Kids' Safe and Healthful Foods Project survey results: Equipment and infrastructure challenges

Spill continued the presentation of the KITS study results, shifting her focus to findings about the challenges of implementing the updated standards by the start of the 2012-13 school year. She then asked workshop

participants whether these challenges continue to be an issue a year later:

- **Understanding the requirements.** Participants indicated that although requirements are clearer than they were a year ago, food service personnel at all levels still need training on these requirements.
- **Cost and availability of appropriate food.** Several participants suggested that the cost and availability of appropriate food have improved in the past year, but others indicated this is an ongoing challenge, particularly in smaller districts. One participant noted that improvements began after protein and grain restrictions for school meals were lifted; another said access to fresh produce is still a challenge in some districts. Several participants suggested that smaller school districts could work together to increase buying power.
- **Equipment needs.** The survey explored the top equipment needs in schools. Participants indicated that equipment is needed for all aspects of food service, particularly for receiving, storing, and preparing fresh produce. While awaiting the necessary equipment, schools are using temporary workarounds—such as storing food off-site and transporting it daily, manually chopping ingredients, and keeping produce in temporary containers such as coolers or crates—to meet the standards. Workshop participants indicated that most schools do not have kitchen equipment replacement or upgrade plans, because many districts may not understand how to incorporate equipment needs into capital budget plans. Others reported a lack of collaboration with food service staff when school districts budget for and coordinate capital expenses.
- **Infrastructure needs.** Survey respondents offered the following as the top infrastructure improvements needed in school kitchens: greater physical space, increased electrical capacity, increased plumbing capacity, more ventilation, more natural gas, and changes related to bringing facilities up to code. Several workshop participants also pointed to the importance of updating cafeterias to make them welcoming and appealing to students. A few participants noted that the expense to upgrade infrastructure to accommodate new equipment will often equal or surpass equipment costs and emphasized that schools should remember to include these costs in their equipment upgrade budgets. Workshop participants commented that many SFAs may not fully understand their infrastructure needs. Some emphasized the importance of coordinating infrastructure upgrades with other capital expenditures within a district and noted the need to include food service personnel in this process.

## Presentation of case studies

Alyssandra Campaigne, of Engage Strategies, provided an overview of case studies to demonstrate the ways in which some school districts are meeting their kitchen equipment, infrastructure, and training needs.

First, she revealed the approaches that school districts commonly employ to finance equipment and infrastructure:

- Broader school financing plans (bonds, local option sales tax, and capital campaigns).
- State appropriations (tied to health and educational outcomes).
- Private national grant programs (breakfast in the classroom, and salad bars in schools).
- Public grants (USDA fruit and vegetables grant, Centers for Disease Control and Prevention Great Trays grant, and USDA Rural Development Community Facilities Program).
- Local private grants (from various local foundations).
- Cost savings rolled into kitchen equipment (partnering with vendors that use the same type of equipment and using identified savings from some equipment to finance other equipment).

- Contracting (securing low-interest loans for equipment).

Next, she shared insights from school districts regarding the critical task of training food service staff at all levels. School districts indicated that training should be convenient, flexible, and professional. Curriculums should include lessons on how to prepare certain types of food, how to use each piece of kitchen equipment, and how to market the foods to students and parents. Partnering with local culinary institutes and chefs is one example of a strategy that can make training interesting and help empower and motivate food service personnel.

Campaigne concluded by noting that successful implementation of a school meal program requires establishment of leadership and a vision, a professional and motivated food service staff, and buy-in from stakeholders (students, parents, school staff, school boards, and taxpayers). She also acknowledged the importance of flexibility so that programs can be tested and improved along the way.

## Stakeholder panel: Success stories

Next, a panel of four stakeholders offered insights and tips based on their efforts to address school kitchen equipment and infrastructure challenges.

Jennifer LeBarre, director of school nutrition for the Oakland (CA) Unified School District, reported that facilities were the district's biggest challenge in operating its school meals program, because meals are prepared at two central facilities and transported throughout the district. To demonstrate how better to meet the needs of the school meal program, the district hired a consultant to conduct a feasibility study. The study took three years, and the results were incorporated into the facilities master plan, which was then used to craft a bond measure. The bond measure was approved, providing \$40 million to build a new central kitchen, as well as an urban farm and education complex designed to serve lower-income communities within the city. LeBarre said the bond measure was approved because the school district worked with members of the community, discussing the need for resources to help boost their children's long-term success with improved nutrition and the plans for how the funds will be used to accomplish these goals.

Teresa Carithers, associate dean of the School of Applied Sciences at the University of Mississippi, spoke about her work in evaluation of the Nutrition Integrity Statewide Program Assessment. This program is a partnership between the Bower Foundation and the Department of Education to improve students' health and nutrition by providing funds to help purchase combination oven steamers, known as "combi ovens," in order to eliminate deep fat fryers in Mississippi schools. The Bower Foundation also provided support for development of a technical assistance document, which helped schools determine whether a combi oven was appropriate for their needs. The program started as a small pilot and was evaluated along the way by the School of Applied Sciences. The evaluation revealed that the nutrition integrity project had a positive impact beyond the schools that participated in the pilot; once the benefits of combi ovens were explained and publicized, other schools wanted to follow suit, either through the program or by finding other creative ways to finance their purchases. When asked how schools paid for the ovens, Carithers noted that in addition to using the funds from the sale of the fryers, the grants appeared to be an effective catalyst to motivate many schools to find creative funding methods from local, state, and federal sources. Nutritional and economic benefits were also documented.

Jean Ronnei, director of school nutrition for the St. Paul Public Schools in Minnesota, said the school district purchased high-quality equipment in bulk to ensure that all designated equipment funds were used effectively when available. The district has achieved long-term efficiencies through conducting a needs assessment and distributing the equipment carefully over time to fulfill specific inadequacies in school kitchens as they emerge.

Jessica Shelly, food service director for the Cincinnati Public Schools, said that one of the district's goals was to increase participation in its school meals program, and that participation increased from 48 percent to 69 percent when a greater variety of food was offered as a part of the meal. When asked what they wanted most, students requested salad bars. The district approached several companies and nonprofit organizations for funding, and each school eventually got its own salad bar. Shelly reported that other districts in the area are considering similar approaches, and she encouraged workshop participants to be proactive about finding the resources they need, including asking for assistance.

## Small group discussions: The world as we know it

Workshop participants met in four smaller groups to build on discussions about how school districts have strategized to upgrade their kitchen equipment and infrastructure. Participants pointed out that collaboration, entrepreneurship, resourcefulness, and creativity are major components of a program's success. More specifically, the following themes emerged from these discussions:

- Plan and evaluate.
  - Develop a vision for improved meal service with a range of stakeholders involved in providing meals, understand what is needed and the options to fulfill that vision, determine how to prioritize those needs, and calculate and articulate compellingly the anticipated return on investment for fulfilling these needs.
  - Create a business plan and seek a planning grant or in-kind assistance to develop the plan if needed.
  - Create near-term (to meet requirements and make relatively minor improvements) and long-term (for more substantial improvements) financing and procurement plans—specifically for kitchen equipment and infrastructure needs—and integrate them over time.
  - Explore all possible sources of sustainable funding, make an effort to apply for grants of all sizes, and ask for support.
  - Research and evaluate all options for obtaining needed equipment and/or upgrading infrastructure, including leasing equipment, buying and selling used equipment, securing equipment donations, and requesting multiple quotes before making a purchase.
  - Consider “front of house” (in the cafeteria or dining room) design options to make food service appealing and engaging.
- Collaborate.
  - Develop partnerships with other districts to share knowledge, combine different strengths and skills, and ensure the best prices (share bid information and join purchasing groups).
  - Partner with other groups in the community (local universities, hospitals and nonprofits) to assist with obtaining equipment and/or providing the community outreach needed to help secure that equipment.
  - Explore opportunities for philanthropic sponsorship.
- Communicate.
  - Build the case for upgrades and improvements and connecting food service to health and education with primary stakeholders to garner support and fundraising assistance by highlighting:
    - Economic development arguments—Gather data showing the financial benefit of building and materials purchases, purchasing food from local farmers, and using the improved kitchen and cafeteria space for community events outside of school hours.

- Health arguments—Emphasize the role of food in improving the health of children and families.
- Participation arguments—Demonstrate that better food can lead to happier customers and increased revenue for the school.
- Energy efficiency arguments—Conduct energy audits to obtain data and make the pitch for new equipment. (Note: Manufacturers’ representatives could assist in energy audits.)
- Tailor communications to each target audience to focus on what is of greatest interest while connecting the messaging with common themes (greater success of students with healthier meal programs, reduced obesity rates, and improved food service area as a community asset).
- Develop and advance new ways to portray food service programs (e.g., food service is an opportunity to teach manners, civil engagement, and fellowship).
- Establish and use different language to build greater understanding and more partnerships by:
  - Using terms such as “dining experience” to refer to students’ experiences with food service.
  - Building bridges between educators focused on teaching students in an educational model and food service personnel focused on providing nutritional, delicious, and affordable food in a business model.

Through these discussions, participants brainstormed about specific strategies for cutting costs and increasing revenue to finance kitchen equipment and infrastructure upgrades, including the following:

- Realizing savings by developing a detailed procurement strategy for equipment and supplies, which may include:
  - Soliciting multiple bids from suppliers.
  - Joining a regional or national purchasing group.
  - Focusing on local procurement opportunities to help decrease costs (saving money by working directly with local farmers and food banks).
  - Standardizing equipment throughout the district (bundling equipment contracts).
  - Seeking financing opportunities from major equipment manufacturers.
  - Taking advantage of rebate opportunities.
- Streamlining operations to reduce costs by:
  - Shifting to use of central kitchens and finishing/satellite kitchens.
  - Revising menus based on available equipment.
  - Emphasizing making more meals prepared from fresh ingredients, known as scratch cooking.
  - Selling or trading unused or underused equipment.
  - Leasing or purchasing less expensive equipment.
  - Conducting energy audits and identifying energy savings.
- Working with other school districts by:
  - Aggregating and leveraging purchasing power (sharing bid information, bulk purchasing, etc.).
  - Sharing equipment at central kitchens or outsourcing full production of meals.

- Sharing cost-saving “tricks of the trade” and success stories.
- Identifying unused equipment that can be sold to other schools at reduced prices.
- Creating revenue opportunities through:
  - Setting up kiosk locations outside the cafeteria to increase sales (i.e., going to where the students are).
  - Renting out school kitchen facilities (for private events, catering, etc.) when school is not in session or establishing a school-community kitchen or processing center.
  - Producing meals for other schools, day care centers, or senior centers in the area or region.
  - Hosting fundraisers (e.g., meals prepared by celebrity chefs).
- Securing funding through:
  - Bundling kitchen infrastructure and equipment expenses with new school bond initiatives.
  - Obtaining low-interest loans to finance upgrades.
  - Soliciting sponsorships and donations (funding and equipment) from suppliers, corporations (especially local banks and health facilities, which often have a requirement to reinvest in the community), and local organizations (sports teams and YMCAs).
  - Applying for private, local, state, and federal grants.
- Securing internal (within the school district) funding through:
  - Marketing the benefits of the school lunch program to decision-makers.
  - Collecting evidence of successful efforts and sharing it with decision-makers.
  - Increasing meal participation by selling meals outside of the cafeteria at locations where students tend to congregate, such as a courtyard area.

## Small group discussions: The world as we wish it

Workshop participants joined new small groups to discuss additional ideas for creatively building on financing strategies for improving school kitchen infrastructure and equipment. These small groups reiterated the importance of:

- Developing kitchen equipment and infrastructure upgrade and replacement plans and evaluating these plans once implemented.
- Working with partners (school districts, vendors, corporations, community groups, foundations, and nonprofits) to develop, fund, implement, and share information about these plans.
- Carefully and creatively communicating the reasons for and benefits of implementing these plans.

They identified the types of information and support needed to carry out these actions, including training on how to develop, implement, and evaluate business plans and a central resource with information about finance strategies, available grants, success stories, and outreach plans. Participants also discussed the importance of reframing the school meal program as a vital component of a productive school day and not an interruption.

The following models emerged as possible approaches for leveraging resources and partnerships to improve and enhance school meal programs.

- Developing a sponsorship model, which could include:
  - Developing “adopt a school” campaigns within school districts targeted at local businesses or philanthropies.
  - Naming updated and remodeled cafeterias and kitchens after key sponsors and funders.
  - Inviting core organizations, such as parent teacher organizations, booster clubs, and student government associations, to take the lead in building robust funding support for improvements to schools’ kitchen and cafeteria equipment and infrastructure.
- Developing an investment model, which could include:
  - Making large sums of money available for loans to schools.
  - Working with local banks and credit unions to secure low-interest loans for expenses related to upgrades.
  - Exploring social financing options—collective fundraising that leverages small dollar amounts to reach a goal (RSF Social Finance in San Francisco and Kickstarter campaigns).
  - Developing a program to match relevant donors with specific school needs.
  - Encouraging private industry to invest in municipality bonds.
  - Using federal and state funds to leverage funding from other sources (matching funds and bonds).
  - Using modernization funds to improve facilities based on projected enrollment growth.
  - Employing a financing model similar to the Fresh Food Financing Initiative—a financing program designed to attract supermarkets and grocery stores to underserved urban and rural communities by paying for infrastructure costs and credit needs not met by conventional financial institutions.
  - Developing regional pilot efforts, scaling up to cover the full region, and replicating the most effective strategies.
- Employing a revenue-generating entrepreneurial model, which could include:
  - Generating revenue by leasing or renting schools’ kitchens or cafeterias for nonschool events and activities.
  - Contracting with other facilities such as child care or senior centers to provide meals.
  - Accepting advertising revenue by partnering with local or national businesses to promote brands that reinforce the goals of the school meals program.
  - Holding reverse online auctions to sell unneeded equipment.
  - Setting up food kiosks at strategic locations around the school to sell breakfast, lunch, snacks, etc.
  - Developing a catering operation by making the school food service facility and staff available to cater internal and outside events.
- Establishing a partnership model, which could include:
  - Partnering with other schools, districts, or community organizations to share equipment and procurement information.
  - Piggybacking on food and equipment bids for other state entities, such as prisons.
  - Partnering with other districts to standardize menus and buy in bulk.

- Working with food banks to make use of excess food.
  - Bartering and swapping services (marketing and grant writing).
  - Partnering with other local groups that share a mission (hunger advocacy groups, youth-focused groups such as Boy and Girl Scouts and YMCA/YWCA, local colleges or universities, hospitals, etc.).
  - Collaborating within and among school districts to compile and develop shared resources (a business plan “toolbox,” grant information, menu development, and business skills).
  - Collecting relevant lessons learned from professionals in other sectors, such as tricks of the trade.
  - Engaging the local culinary community to help train and professionalize food service staff, revamp menus, generate excitement, and raise the profile of school lunches.
- Developing an outreach model to rebrand school meal programs and communicate targeted messages to stakeholders, which might include:
    - Reaching out to the media to showcase the important role of school meal programs.
    - Inviting high-profile decision-makers to be guests or guest servers at a school meal.
    - Recruiting the services of local or celebrity chefs to raise the profile of school meal programs.
    - Generating excitement through local contests (recipe contests, Junior Iron Chef contests, and school makeover contests with local business contributions).
    - Identifying needs and advertising them broadly to potential partners who can help address these needs.
    - Branding schools as “joint use” facilities within a community.
    - Engaging the customers (students and parents) through menu planning and educational programs regarding the role that food plays in their lives.
  - Testing a behavioral economics model, which might include:
    - Designing cafeteria space to encourage healthy choices and increase sales.
    - Offering experiential learning opportunities for local officials and key decision-makers in the school district, such as inviting school officials to experience school food service.
    - Eliminating the three-tiered model (free, reduced, and paid) and making all school meals free to ensure that everyone has a stake in school meal programs.
    - Developing a set of standards for school food service similar to LEED, or Leadership in Energy & Environmental Design, a program that provides third-party verification of green buildings.

The groups shared ideas for creatively motivating food service staff, building relationships with potential partners, and encouraging involvement from others in these types of activities. Suggestions included educating food service staff and the community on the school meal program as an essential component of students’ health and well-being, highlighting the important role that schools play in a community (centers of learning, community centers, and emergency preparedness facilities), and incorporating the culinary arts into school meal programs (reaching out to chefs to help train staff and holding culinary contests). While most of these strategies are focused on a local scale, participants also discussed strategies of a national scale. For example, the groups discussed partnerships with organizations or companies with national profiles, associations, or other large entities. Other examples included building kitchen equipment exchanges and purchasing opportunities online. Participants also discussed the need for national standardization and accreditation of food service programs and the credentialing of directors.

Attendees talked about the value of learning from other sectors that require substantial upgrades of equipment, infrastructure, and training. Some participants also suggested consulting with businesses that have been successful at turning things around and/or reinventing themselves.

## Overview of discussion—July 30, 2013

### Summary of findings from the previous day

Jessica Donze Black used an interactive polling mechanism to collect workshop participants' feedback on a number of topics. Through this tool, attendees indicated that developing a business plan (which incorporates activities related to equipment, labor, and menu development) is the best way to empower school districts to build support for equipment procurement. Participants also revealed that they largely value entrepreneurial approaches to facilitate upgrades to school kitchen equipment and infrastructure. Innovation and creative thinking, many participants emphasized, is the key to success.

### Training opportunities and challenges

Spill presented the Kids' Safe and Healthful Food Project's KITS survey results on the challenges and opportunities associated with training. The survey asked about specific training areas for SFA directors and food service management teams, kitchen and cafeteria managers, and cooks and frontline servers to successfully operate school nutrition programs and implement the updated standards. The list included:

- Assessing equipment and infrastructure needs.
- Basic cooking skills.
- Basic food safety training.
- Basic nutrition training.
- Completing applications/paperwork for additional reimbursement and Coordinated Review Effort reviews, which are evaluations of a school district's food service operation to ensure compliance with National School Lunch Program standards.
- Completing production records.
- Developing or modifying menus.
- Marketing and promoting the new meal requirements.
- Modifying and/or standardizing recipes.
- Purchasing new equipment.
- Revising food purchasing specifications.
- Understanding compliance with meal pattern and nutrient requirements.
- Using/operating new equipment.

Spill asked how training needs might have changed from a year ago, when the survey was completed and schools were in the process of implementing the meal standards. Several participants indicated that although training needs still exist on meal pattern requirements and certification paperwork completion, they may be less prominent now that most schools have adapted to the updated standards. In particular, participants indicated that the lack of understanding of the requirements was probably tied to the timing and that fewer people would

indicate that concern today. A few participants pointed to the need for training on the business plan development process, based on the discussions throughout the workshop thus far.

## Stakeholder panel: Success stories

Next, a panel of four stakeholders offered insights and tips based on their efforts to address food service personnel training needs.

Andrew Nowak, project director for Slow Food Denver, a grassroots organization that promotes local, sustainable food, explained that his organization formed a partnership with the Food and Nutrition Services Department of the Denver Public Schools to help bring locally grown foods into schools. As part of the local procurement process, food service staff participated in training boot camps on scratch cooking. The training was well received by kitchen staff and managers.

Leo Lesh, retired executive director of food and nutrition services for Denver schools, reported that the district provided an intensive three-week scratch cooking training program for all food service personnel. The first week focused on cold food preparation, the second week on baking, and the third week on prep cooking. The training began with a core group of 120 employees over the summer in an effort to ensure that 30 schools across the district started the school year with personnel who had participated in the training. Participants were compensated for their time, a formal graduation was held, and members of the community were invited to taste the new food on the school menus. Although the school district originally planned to train the staff at all schools in the district within three years, the training was completed within 1½ years because sessions were conducted during the summer, on weekends, and in the evenings. Training was streamlined along the way to make it as efficient and useful as possible. Lesh reiterated the importance of ongoing education, making sure that the right people are recruited into the programs first, and recruiting the right trainers—those who are respectful, collegial, creative, and fun.

Eileen Staples, director of school nutrition for Greenville County Schools in South Carolina, spoke about the challenges of implementing hazard analysis and critical control points in more than 90 schools. She noted that creating specific training modules helps to keep trainings consistent; frequent trainings ensure that all employees eventually understand the material. Although challenges initially rose from not training all staff simultaneously, the decision to make training a requirement for advancement has proved to be wise. Staples emphasized that training programs are most successful if employees understand and support a program's vision and goals.

Sarah Lyman, senior program associate for the Empire Health Foundation, shared lessons learned from the foundation's partnership with six school districts in the state of Washington. The foundation supported several levels of training, first on building important culinary skills and knowledge of healthy food preparation, then on building employee morale and support for making significant changes to the school food environment. Other training focused on topics such as cost savings, communications skills, production efficiency, and re-engineering recipes. A local chef served as an on-site adviser and helped schools create menus and address culinary challenges during the changeover process. Other steps taken to professionalize food service, such as purchasing chef hats and coats, helped motivate staff. She added that observing a reduction in student obesity rates has helped food service staff to see how their work can positively affect others.

## Small group discussions: Addressing barriers to training

Workshop participants again convened in small groups to discuss the challenges to securing training and possible solutions for increasing training opportunities.

The small groups' deliberations cited a number of challenges associated with training programs, including:

- Finding the time, tools, and financial resources to conduct meaningful trainings.
- Identifying qualified and appropriate trainers who take a compelling, collegial approach to teaching adults who might have varying levels of education and proficiency in English.
- Motivating staff to participate in training, embrace the content, and stay in their positions.

Although finding the resources for trainings can be challenging, several participants noted that it is often easier to get funding for training than for equipment and infrastructure upgrades. Other participants noted the importance of making every effort possible to hire staff with the appropriate competencies for food service operations. They also suggested that offering meaningful training opportunities can help reduce staff turnover.

The groups shared and discussed ideas for boosting the success of training programs, including:

- Gaining support of food service staff.
  - Modifying outdated job descriptions to better incorporate and link to trainings, and making training requirements and expectations clear to food service staff upon hiring.
  - Offering incentives for food service personnel to participate in voluntary trainings and providing greater visibility and opportunities to those who have participated in such trainings, such as emphasizing position retention and advancement, offering raises and/or bonuses, selecting employees of the month, creating new titles for employees (salad bar ambassadors, for example), and offering fun trainings (e.g., celebrity chefs, graduation ceremonies, and contests).
  - Engaging those who are motivated and willing to be trained, thus encouraging others to follow.
  - Holding food service staff accountable for material/skills learned in mandatory trainings.
- Earning buy-in from other stakeholders (administration, unions, parents, etc.).
  - Explaining to administrators and food service staff why training is important and how school meal programs can play an important role in the health and well-being of students.
  - “Training up” by educating administrators and policymakers on the importance of training and food service operations (e.g., using annual reports, hosting a general session with management, creating district newspapers/newsletters, and holding monthly meetings with administrators).
  - Improving relationships with the union representing food service workers and working with the union to offer useful training to food service personnel and support services (e.g., transportation and child care) to help make training more accessible and affordable.
  - Developing ways to assist customers—students and parents—in understanding updated regulations and the solutions being implemented (consider incorporating into “back-to-school” night).
- Making training more available and accessible.
  - Scheduling trainings based on the availability of the staff (brief trainings first thing in the morning and providing substitute staff during the school day so personnel can allocate time for training).
  - Training staff in their kitchens with their equipment (rather than off-site training).
  - Considering different approaches, such as “popcorn sessions”—e.g., 15-minute modules—to introduce and reinforce lessons throughout the year.

- Developing and circulating training resources—especially instructional materials with images—that personnel can use as a reference between formal training sessions (e.g., training manuals, training videos, online training modules, equipment maintenance instructions, information on the latest regulations and policies, and menu development or options).
- Improving quality of training sessions.
  - Determining training needs based on district or departmental goals and to serve as a means to achieve those goals.
  - Conducting basic skills and culinary needs assessments to understand the scope of training required for different types of food service personnel (SFAs, kitchen and cafeteria managers, and cooks and frontline staff).
  - Consulting with food service personnel to determine the types of training desired and, when appropriate, inviting personnel to help develop and deliver trainings.
  - Partnering with other school districts to identify key training needs and to simultaneously train food service personnel.
  - Identifying trainers who understand the material, know how to train and motivate adults, and leave trainees feeling satisfied by the experience—and sharing this information with other school districts in the area.
  - Involving industry representatives in training (e.g., offering advice on how to maintain and repair equipment, sharing tips on how to evaluate return on investment, and adapting menus to correspond with available equipment).
  - Bolstering professionalism, morale, and confidence by offering trainings on topics such as communications, cultural differences, conflict resolution, marketing, advocacy, customer service, and financial management.
  - Updating trainings as regulations and policies change.
  - Analyzing which trainings provide the biggest return on investment.

The small groups emphasized the need for training on how to develop, monitor, and evaluate business plans. As several participants pointed out, food service personnel at all levels need to understand how their actions can directly affect the food service budget. Teaching SFAs and food service personnel how to develop, implement, and evaluate a business plan could have a significant impact on the ways in which school kitchen equipment and infrastructure plans are developed and implemented in the future.

## Concluding remarks

Jessica Donze Black thanked participants for their attendance and their enthusiastic and thoughtful participation in the workshop's discussions and activities. She commented on the group's elevated level of energy and camaraderie and encouraged participants to apply the lessons learned to their work and activities. Participants echoed Donze Black's sentiments and reminded one another to demonstrate leadership, be bold, and ask for assistance. Noting that schools are all in this together, several participants encouraged one another to continue collaborating in the future.

Donze Black concluded the workshop by noting that its proceedings and reports detailing the KITS study results would be published over the next six months and shared with stakeholders.





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