

# Menu Planning & Development

**Professional Standard Code(s):** 1100-Menu Planning, 3300-Financial Management, 4000-Communications and Marketing

**Key Areas:** 1120-Cycle Menus (0.25 hr.), 3340-Financial Analysis (0.25 hr.), 4110 Strategic and Marketing Plans (0.5 hr.)

**Hours of Instruction:** 1

## PREPARATION

Supplies and Equipment	Classroom Setup
<ul style="list-style-type: none"> <li>• Instructor lesson plan</li> <li>• Ground rules</li> <li>• Bike rack</li> <li>• Sample data for people who forget to bring menus/data</li> <li>• Flip chart and markers</li> <li>• Highlighters, two colors per participant</li> </ul>	<ol style="list-style-type: none"> <li>1. Set up tables for small group discussion (4-5 participants per table).</li> <li>2. Post ground rules and bike rack on wall/whiteboard.</li> <li>3. Set up flip chart.</li> <li>4. Place highlighters on tables.</li> </ol>
Background Information and References	
<ul style="list-style-type: none"> <li>• Participants will bring the following <b>data for one month</b> of operation:               <ul style="list-style-type: none"> <li>○ Menus</li> <li>○ Number of meals served by day (or by item, if possible)</li> <li>○ May also bring velocity reports</li> </ul> </li> <li>• Participants will transcribe participation data onto each menu (by day or item)</li> </ul>	

## OBJECTIVES

**Upon completion of this module, participants should:**

1. Understand the importance and value of strategic menu planning.
2. Be able to plan for unexpected menu issues.

# LESSON

Instruction	
<p><b>INTRODUCTION</b>  (5 MIN)</p>	<p>Introduce yourself/your background.</p> <p><i>Ask:</i> Introduce yourself by sharing your name and school district background (ex: enrollment, number of schools, number of meals, federal programs you administer)</p>
<p><b>LECTURE/ DISCUSSION</b>  <b>PART 1:</b> (10 MIN)</p>	<p><b>Menu Basics</b></p> <p><i>Ask:</i> What makes a good menu? Ask a volunteer write participant ideas on the flip chart.</p> <ul style="list-style-type: none"> <li>• <b>Ideas:</b> Student acceptance, meets price points, meets nutrition standards</li> </ul> <p><i>Say:</i> Menu drives your whole program. It is important that you are thoughtful and strategic in planning your menus by considering factors such as:</p> <ul style="list-style-type: none"> <li>• Financial impact: Excess inventory (yours or distributor's) cost money; USDA foods and DOD produce can be a cost savings; plan and forecast accurately.</li> <li>• Know your numbers: Utilize production records, monthly participation reports, distributor velocity reports, and point of sale reports.</li> <li>• Student preference: Taste test, taste test, taste test! Consider visual appeal (color, texture).</li> </ul> <p><i>Say:</i> We are going to do a quick activity to demonstrate how you can use your numbers plan your menus.</p> <p>If you brought your division's menus and participation data, please take those out. If you forgot to bring your data, I have sample data you can use to complete the activity.</p>

<p><b>ACTIVITY 1</b></p> <p><b>(5 MIN)</b></p>	<p><b>Activity: Menu Winners &amp; Losers</b></p> <ul style="list-style-type: none"> <li>• <b>Step 1:</b> Looking at your menu data, highlight your top five entrée items. These are the items selected most often by your customers (i.e. your winners). Typically, these are your meat/meat alternate components.</li> <li>• <b>Step 2:</b> Now look for your lowest numbers and mark your bottom five entrée items (i.e. menu losers).</li> </ul> <p>This activity helps you identify what is selling and what is not.</p> <p><b>Follow Up Questions</b></p> <ul style="list-style-type: none"> <li>• <i>Ask:</i> Are there any surprises? Consider menu placement and menu pairings. What effect do they have on winners and losers?</li> <li>• <i>Ask:</i> What if your menu was all winners? Using your data, you can create a menu that focuses on all of your customers' favorites!</li> </ul>
<p><b>LECTURE/ DISCUSSION</b></p> <p><b>PART 2: (20 MIN)</b></p>	<p><b>Cycle Menus (10 min)</b></p> <p><i>Ask:</i> How can you get a menu full of winners? <i>Think about a cycle menu.</i></p> <p><b>Pros and cons</b> of cycle menus (<i>have a volunteer write ideas on a flip chart</i>).</p> <ul style="list-style-type: none"> <li>• Possible pros: use only the top sellers, better inventory management, improved efficiency in workflow, improved forecasting</li> <li>• Possible cons: less variety, harder to move an item that isn't selling</li> </ul> <p><i>Lead discussion on how many weeks for your cycle menu.</i></p> <p><i>Ask:</i> Is it truly a cycle menu if you start repeating items in a three or four week cycle? Is a shorter cycle better at meeting your students' needs?</p> <p><i>Prompts:</i> Are you filling menu slots with unpopular items just to complete a longer cycle? Do your customers really want more variety? Are you repeating items within your cycle?</p> <p><i>Say:</i> Consider concept of seasonal vegetable/fruit. Consider first and second semester changes.</p> <p>Use your data to put only winners on your cycle menu.</p> <p><b>Managing Leftovers, Bombs, and No-Shows (10 min)</b></p> <p><i>Say:</i> But, wait a minute! It's not a perfect world so we need a plan to manage the unexpected.</p>

	<p><i>Ask:</i> What are some of those unexpected occurrences we have experienced?</p> <ul style="list-style-type: none"> <li>• Leftovers: may have local health department rules or establish local program rules.</li> <li>• OR No one likes our new item! Now what?</li> <li>• OR Delivery issues due to poor quality, inclement weather, etc.?</li> </ul>
<b>Activity</b>	
<p><b>ACTIVITY 2</b> <b>(10 MIN)</b></p>	<p><b>Activity: Bombs &amp; No-Shows (5 min):</b></p> <ul style="list-style-type: none"> <li>• <b>Step 1:</b> Divide participants into two major groups: Bombs and No-Shows. Depending on group size, there may be more than one of each group. <ul style="list-style-type: none"> <li>○ <b>Bombs</b> are those items that turned out to be unpopular and they are still sitting in inventory</li> <li>○ <b>No-shows</b> are the items that didn't make it to your schools for whatever reason, like rejected for poor quality, late delivery, left off of delivery, etc.</li> </ul> </li> <li>• <b>Step 2:</b> Have table talk discussion on ideas to manage each. Write your ideas on flip chart and be prepared to present your top ideas.</li> </ul> <p><b>Follow-Up (5 min):</b> <i>Say:</i> Now let's have each group report one new idea from your table top discussion.</p>
<b>Debrief</b>	
<p><b>DEBRIEF</b> <b>(5 MIN)</b></p>	<p><i>Ask:</i> What is one thing you can do to be more strategic in menu planning?</p> <p>Anyone thinking of changing the number of weeks in your cycle menu?</p> <p>What about your bombs and no-shows?</p>
<b>Closing Remarks</b>	
<p><b>CLOSING</b> <b>(5 MIN)</b></p>	<p><i>Say:</i> Remember that your menu is a key driving force behind your whole program.</p> <p>Good menu planning has a positive financial and participation impact. We took a snapshot look at data today; however, it is best to use data for a whole school year or at least one complete cycle. If you use more than one menu, like elementary and secondary, you will need to complete the same evaluation of all menus.</p>