The Food School Plan

Appendix

July 2013

Context

- This document is intended as a reference-point for those interested in the detail of the analysis conducted by OC&C Strategy Consultants to support the development of the School Food Plan. Some of this work is referred to directly in the Plan, other parts of it simply informed the thinking contained within it
- OC&C worked primarily in the September 2012 to January 2013 period, with further updates on specific topics between then and the launch of the Plan itself
- All information supplied by OC&C is for the sole use of its client and no responsibility is accepted by OC&C for any reliance placed upon the information by third parties

Contents

Historical Context

- Who Eats What, And Why
- Take-Up Patterns And Drivers
- The Economics Of School Food
- Challenges
- Regulation And Standards
- International Examples

Take-up fell significantly during the late 1970s and 1980s; despite some improvement in the last three years, it remains below 45%

Long-Term Trend In Take-Up of School Meals, 1970-2012

% pupils, Primary and Secondary Combined



mendix slide

Sharp price increases were a crucial factor in take-up declines



Many of the common perceptions about the history of school food are not fully supported by the evidence

Perceptions	Accuracy?	Reality
The school food service worked perfectly in the 1950s and 1960s	X ?	 Although take-up was higher, the food served was far from perfect nutritionally Pupils' relationship with food was very functional
 Government policy from 1980 liberating the market, caused the main fall in take-up 	x	 No more than partly true – take-up had been falling from the mid 1970s Contract caterers still have a clear incentive to maximise take-up
Fast food is the problem	X	Less than 10% of children eat off-site
 Kitchens and dinner ladies have been under- invested 	√ ?	 Where reviews have occurred, many kitchens appear to need catch-up investment Motivation of kitchen and serving staff often reported to be low Some evidence that skill levels of kitchen staff could be improved
The increase in average school-leaving age reduced percentage take-up	√?	 Take-up is lower on average for sixth-form pupils, but the change in numbers was not large enough to account for the bulk of take-up decline
 Strikes and union activity in the 1960s started a move away from school food 	X	Sharp declines did not start until the mid-1970s price rises and much wider social changes
More aggressive marketing of snacks and unhealthy food reduced the appeal of school food	√ ?	Take-up levels vary much more than this would suggest – although it is a plausible contributory factor

Appendix slides

Contents

Historical Context

■ Who Eats What, And Why

- Take-Up Patterns And Drivers
- The Economics Of School Food
- Challenges
- Regulation And Standards
- International Examples

There are currently 8.1 million children at school, of which an average of 3.1 million eat school lunches each day

Total Volume And Spend On School Food 2012



Two-thirds of children who have the option to pay for a school lunch choose not to



Packed lunches are the commonest alternative to school food

Total Volume And Spend On School Food



Source: Department for Education, School Food Trust, OC&C analysis

The preference for packed lunches is similar at primary and secondary schools alike

Take-Up of School Meals



pendix slides

Parents identify several reasons why their child has school food – not just the quality of the meal, but its healthiness, familiarity with the food, variety, and how well it fits the child's need to socialise at lunchtime

Reasons For Child Having School Meal¹



1. Based on survey of parents' responses Source: SFT Survey 2012

The idea that there are several factors influencing whether or not children eat school lunches is supported by a very recent survey that pointed to social factors and health benefits alongside value for money

Reasons For Child Having School Meal

You said your child DOES have school dinners, what is the main reason for this? % Respondents



Those parents whose children eat a packed lunch often point to the price of school meals as a deterrent

Reasons For Child Having Packed Lunch



A more recent survey highlighted the same perceived barrier – high price is the main reason for not choosing school food, and making it cheaper is the change most likely to encourage more take-up

Drivers Of Choice Of Lunch



Source: YouGov survey for The Sun, April 2013, 493 respondents to these questions

It is clearly possible to make a simple packed lunch for well under the c£2 average price of a school meal – although these examples do not include cooked food and may not be nutritionally equivalent to a school lunch

Packed Lunch Prices



Source: Tesco.com (prices as available January 2013), Mumsnet, OC&C analysis

Packed lunches are consistently less nutritious than the standards stipulate school meals should be

Assessment Of Packed Lunch Contents Against Standards

Aged 8&9 Pupils' Packed Lunch Contents





Lunch Box Contents Meeting Food Standards

Source: Journal of Epidemiology and Community Health - Evans (2010), OC&C analysis

There reasons for choosing packed lunches or school dinners can be grouped into four areas: price, food, environment and social factors

Parent Views of School Meals

Primary School Parents

The	Meal	The Situation		
Price	Food	Environment	Social	
"I have 3 kids and £30 a week is an awful lot of money"	"It's not what's on the menu that bothers me, more the quality of the ingredients. It's not what I would serve at home"	<i>"My son loves it that his teacher has dinners, it is a male teacher and the boys adore him and often choose the same thing as him"</i>	"Even when my husband was on incapacity benefit I never claimed for free school meals for our child they had a sandwich, basics yoghurt piece of fruit and a diluting drink"	
"I stopped school dinners when I found out my child was choosing the soup option every day. Didn't mind paying £2.20 for a cooked meal but not for half a tin of soup"	<i>"I refuse to allow mine the hot lunches because they came home so hungry … this never happened when they had packed lunch"</i>			
 "It's good value at £2 per day but we can't afford that at the moment so it's boring sandwiches for now" "I do make packed lunches at least 3 times a week for economy alone" "The school dinners are tiny for the older kids" 	"We are happy with ours. All cooked from scratch on the premises and they are offered veggie sticks/ freshly baked bread I've been to taster days and liked them"	"Tried daughter on school meals at first, but ended up sending in packed lunches when the teacher told me that she wasn't eating anything. The dinner ladies didn't have time to encourage the children to eat and the children weren't given enough time to eat their lunches"	"This year in Year 2 he just eats as little as possible so he can go out to play. I've gone to packed lunches for that reason"	

Source: Mumsnet discussion group comments, May 2012-January 2013, OC&C analysis

School lunches can often perform badly against these needs

Price	Food	Environment	Social Factors
Expensive	Hot meals but variable quality	Takes too long	Inconvenient
Cashless: parents confident that their money all goes on dinner	Many schools offer healthy options since Jamie's campaign	Many schools have re- furbed and re-branded their dining rooms	Cashless systems have improved FSM stigmatisation
Low income families with multiple children struggle	Pupils may not have a healthy "plate" despite articles for this	Small dining rooms mean pupils can be rushed	Pupils may opt out becaus friends eat outside or offsit
 Poor value when "cheap" options are chosen (eg soup) for a flat meal price 	 Food sometimes runs out before end of service 	Queue time prevents participation in other lunchtime activities / plaving outside	 Øffsite opportunity become "obligatory" when "cool" Ølder girls are increasingly
 Cash: meals perceived to be expensive to pupils who prefer to spend 	 "Healthy" options are sometimes unfamiliar to children Sometimes children don't 	 Queue length puts pupils off & facilitates bad behaviour 	aware of body image, sometimes not eating lund Some families rely on pup to return home at lunch ti
 money at the corner shop FSM allowance not enough for a meal for 1/7 children 	 Ike the food on offer, or the look of it FSM children sometimes only get one choice 	Queuing outside in the cold is off-putting	✗ FSM stigmatisation concerns

Packed lunches overall perform better against these needs – and structurally allow for more flexibility than school dinners



Even for those children who do choose school food, the reality of what they eat can vary significantly from what was on the menu



FSM and paying pupils alike are often selective about how often they eat school food

Frequency of Eating School Meals % of Pupils¹





1. Based on electronic payment record covering 14,962 purchases over a 2-month period in a range of schools

Source: ParentPay, OC&C analysis

21 -

Although example menus in aggregate offer (what is believed to be) a balanced diet that complies with standards, they can be easily navigated

Example Claimed-To-Be-Compliant Weekly Menu

	WEEK 1	Monday	Tuesday	Wednesday	Thursday	Friday
	cook's choice	Pizza, Chips & Beans Pizza	Burger in a Bap, Jacket Wedges & Coleslaw Halal Burger in a Bap	Chicken Drumstick, Roast Potatoes, Carrots & Broccoli Halal Chicken Drumstick	Beef <u>Lasagne</u> , Sweet Corn Peas & Crusty Bread Halal Lasagne	Double Cod Fish Fingers & Boiled Potatoes Double Cod Fish Fingers
	Vegetarian	Pizza	Cheese & Vegetable Bake in a Bap	Sweet Chilli Stir Fry & Noodles	Vegetable Lasagne	Cheese Whirl
Veek 1	For the second	Spaghetti with Thai Sweet Chilli Sauce & Garlic Dough Balls	Pasta Spirals with Italian Sauce & Slice of Baguette	Macaroni with <u>Jalfrezi</u> Sauce & Garlic <u>Naan</u> Bre <mark>ad</mark>	Pasta Shells with Tomato & Basil Sauce & Baguette	Penne with Sweet 'n Sour Sauce & Dough Balls
>	sendyrdi ()	A selection of breads with a choice of. Cheese & Bean Pitta, Tuna Mayo, Cheese or Egg Mayo	A selection of breads with a choice of: Wafer Thin Ham, Tuna Mayo, Cheese or Egg Mayo	A selection of breads with a choice of: Wafer Thin Turkey. Tuna Mayo, Cheese or Egg Mayo	A selection of breads with a choice of: Wafer Thin Ham, Tuna Mayo, Cheese or Egg Mayo	A selection of breads with a choice of: Cheese & Vegetable Bake Bap, Salmon & Tuna Mayo, Cheese or Egg Mayo
	COLOR DO	Ice Cream, Fruit & Wafer	Pineapple Fruit Cake	Chocolate Fudge Cake	Banoffee Ice Cream Pie	Fruit Short Cake & Cream
	Contraction of the second seco	Melting Moment	Orange Cookie	Jam Button	Oat Crunchie	Assorted Biscuits

Compliance with standards is calculated on an "average of the menu" basis not plate-by-plate

Only 1in 4 of the meals bought is a hot meal; snacks and some form of convenience food are more popular

Type Of Food Bought

% of transactions including each type of food (based on sample of 4,943 transactions)¹



Example Food Items Bought

Whole Hot Meals	Roast dinner, cottage pie & vegetables, curry, casserole	
Fast Food	Wrap, sandwich, pizza, pasta pot, chips, cheese melt	
Snacks	Muffin, flapjack, cake, crackers, iced bun	
Drinks	Milk, fizzy drink, fruit juice, water, milkshake, juice drink	
Breakfast	Crumpet, breakfast pizza, toast, teacake, bacon sandwich, croissant	

1 Total sums to more than 100% because transactions may contain items from more than one food type Source: ParentPay, OC&C analysis

It appears that when take-up of plated meals is low, take-up of vegetables is also low



Source: ParentPay, OC&C analysis

Mid-morning food is often treated as a substitute for lunch or a replacement for part of the meal, and in some cases, the mid-morning food available is clearly unhealthy









Contents

- Historical Context
- Who Eats What, And Why

■ Take-Up Patterns And Drivers

- The Economics Of School Food
- Challenges
- Regulation And Standards
- International Examples

Average take-up rates are highest in the North of England and Inner London

Take-Up by Local Authority %, 2012



- At an overall level, take-up shows significant variation by regions in the UK. Northern LAs demonstrate higher uptake than southern LAs – only partly affected by a higher number of pupils claiming free school meals in these regions
 - North East (52.9%)
 - North West (50.3%)
 - South East (35.2%)
 - South West (31.8%)
- Inner London (and other urban areas), typically have higher uptake (London is c.60%), partly supported by the number of schools with stay-on-site policies (97.9% of LA-catered schools).

Across the 150 Local Authorities, average levels of take-up in primary schools vary enormously



That wide range is evident at secondary school level as well



pendix s

Provision models vary region to region, often for historical reasons – although at this level there is no clear relationship to take-up

Provision Model By Region: Secondary Schools

Percentage of Schools Using Different Provision Models, 2012¹



However, looking at individual LAs, there appear to be clusters with common characteristics and some regional bias



Four segments appear to exist, each performing differently and each likely to need different forms of support or encouragement

Definitions Of Segments

- 'The Break-Aways'
 - Take-up over 60% and rising
 - c10% of LAs, all in the North and Inner London
 - Includes councils that have run Universal Free School Meal trials Newham, Durham, Islington, and others that have made a major effort of some kind, like Bolton, Wandsworth, Tower Hamlets

■ 'The Peloton'

- Take-up 40-60% and going up slowly
- c40% of LAs
- Mostly Northern, some Midlands, quite a high preponderance of LA provision

■ 'The Comeback Kids'

- Take-up below 40% but increasing
- c25% of LAs

Mostly in the South-East (especially big shire counties like Kent, Surrey, Hampshire, Sussex) and South-West (Plymouth, Torbay, Dorset, Swindon, Somerset) – both regions with quite a high level of contract-caterer provision

■ 'Stragglers'

- Take-up below average and falling
- c15% of LAs

Those LAs that have achieved significant improvement in take-up have typically made a major intervention on price or changed provision model

Largest Increases In Take-Up By LA 2008-09 to 2011-12



Although LAs typically have less direct control of school food provision in their secondary schools, some similar outstanding rates of improvement are evident

Largest Increases In Take-Up By LA 2008-09 to 2011-12

Increase 26 +34% pts Camden 60 34 +26% pts Sunderland 60 11 +20% pts Dorset 31 33 Enfield +17% pts 50 56 Hackney +14% pts 70 32 +13% pts Shropshire 45 23 +13% pts Suffolk 36 37 +13% pts Knowsley 50 43 South Tyneside +13% pts 56 41 +12% pts Barnsley 53

Secondary Schools

Take-up rates do vary according to the politics of the LA

Variations In Take-Up By Politics Of LA

% take-up (including FSM), 2011-12



Primary School % Take-Up

 'Strong Labour' defined as LAs where Labour holds more than 65% of the seats (27 LAs); 'Labour' where it holds a simple majority (32 LAs); 'Hung / Lib Dem' refers to instances of No Overall Control or a Liberal Democrat majority (28 LAs); 'Conservative' where the Conservative Party holds a simple majority (28 LAs); and 'Strong Conservative' where it holds more than 65% of the seats (34 LAs)

Source: SFT annual surveys, OC&C analysis


However, a large part of that variation relates to FSM entitlement; excluding it suggests smaller differences between Labour- and Conservative-led LAs

Variations In Take-Up By Politics Of LA % take-up (excluding FSM), 2011-12



 'Strong Labour' defined as LAs where Labour holds more than 65% of the seats (27 LAs); 'Labour' where it holds a simple majority (32 LAs); 'Hung / Lib Dem' refers to instances of No Overall Control or a Liberal Democrat majority (28 LAs); 'Conservative' where the Conservative Party holds a simple majority (28 LAs); and 'Strong Conservative' where it holds more than 65% of the seats (34 LAs)

Source: SFT annual surveys, OC&C analysis

olido vibacent

Those regions with a higher proportion of Conservative councils more often use private contract caterers rather than in-house LA teams



Duration of the lunch break seems to have relatively little impact on take-up, and the effect of different lunchtime structures appears quite variable



Source: School Food Trust Primary Data (2009), OC&C analysis

38 -

Take-up increases slightly when both packed lunch and school dinner pupils are allowed to sit together



Primary schoolchildren appear more responsive to positive take-up 'nudges' - choice and rewards



Source: School Food Trust Primary Data (2009), OC&C analysis

40 -

School policies on food, and having an individual responsible, are not enough to move take-up much on their own

Take-Up by Food-Related School Policies Take-Up by Whether There is a Named Take-Up by Whether There is a Named Take-Up by Whether There is a Whole School Food Person School Food Governor **School Food Policy** %, n=101 %, n=80 %, n=99 47% 48% Yes Yes Yes N=74 N=25 N=80 No No 45% 47% No N=25 N=55 N=21

The existence of a policy does not translate automatically to engagement with school food, or increased take-up

Source: School Food Trust Primary Data (2009), OC&C analysis

Primaries Only

47%

45%

The factor that shows the clearest correlation to take-up is price

Relationship Between Price Of School Meals And Take-Up

Sample-based data



- Based on a relatively large sample (97 local authorities), price appears to be a major influence on take-up...
- Although it is possible that once higher take-up rates are achieved, economies of scale allow lower prices to be offered

1. What is the current price to pupils of a paid lunch at your school?

2. Response rate to question

Source: SFT Unpublished Primary Data (2009), OC&C analysis

However, the variation in take-up from school to school is huge



43 🗕

It is noticeable that when several contributory factors are in place at the same time, take-up is much higher

Impact Of Specific Initiatives

% take-up, paid + free meals

							_
		Proposition To Pupils					
	Initiative	Food Quality	Physical Environment	Social / Convenience	Brand of School Food	Val ue For Money	Impact On Take-Up
Langford Primar y	Packed lunches banned, redecorated dining area, cooking lessons	1	1	1	1		N/a 10
South Leeds Academy	New caterer, new dining area, wider food choice, free breakfast	1	1			1	60 96
Maybury Primary	New dining space, 'whole school' approach to food		1	1	1	1	60 95
St Aidan's	Catering in-house, refitted kitchens and dining area	1	1	1			15 90
Carshalton	New chef, scratch cooking, lower prices	1				1	20 80
Dulwich Hamlet	New dining area, tasting events, pupil monitors	1	1	1			28 72
Mossbourne							N/a 70
Southfield	New caterer, food prepared from scratch, pupil consultation	1			1	1	10 67
Great Missenden	New caterer, tasting events	1		1	1	1	58 67
Churnet View	Improved kitchen, faster tills / points of sale	1	1				39 Be

Note: 'before' and after can refer to time-spans of several years, depending on the length of the initiative Source: SFT, School Visits, OC&C analysis

Those examples of achieving take-up gains come from a wide range of schools: primary and secondary, Maintained and Academy, urban and rural

Case Studies Of Achieving Take-Up Gain

	Pr imary / Secondary	Academy / Maintained	Take-up	% FSM	# Pupils	Urban / Suburban Rural	Region	Ethnic Diversity	Provision Model	Price of Meals
Langford Primar y	Primary	Maintained	100%	53%	c.280	Urban	London	1	LA	£1,70
South Leeds Academy	Secondary	Academy	96%	42%	c.1,100	Urban	North	1	Private Contractor	?
Maybury Primary	Primary	Maintained	95%	63%	c.200	Urban	North	1	In-house	£1.30
St Aidens	Secondary	Academy	90%	2%	c.1,900	Suburban	North	x	In-house	£2.60
Carshalton	Secondary	Academy	80%	40%	c.1,000	Suburban	South East	x	In-house	£1.25
Dulwich Hamlet	Primary	Academy	72%	7%	c.360	Suburban	London	×	Private Contractor	?
Mossbourne	Secondary	Academy	70%	36%	c.1,100	Urban	London	1	Private Contractor	£1.85
Southfield	Secondary	Academy	67%	9%	c.1,000	Urban	Midlands	×	Private Contractor	£2.50
Great Missenden	Primary	Maintained	67%	5%	c.380	Rural	South	x	Private Contractor	£2.20
Churnet View	Middle deemed Secondary	Maintained	64%	14%	c.450	Rural	Midlands		LA	

No particular provision model appears dominant, eg there are compelling examples of schools successfully taking school food provision in-house

Example School: St Aidan's, Yorkshire

St Aidan's – Catering in-house

Context

- Large Northern Secondary (c1800 pupils) that converted to Academy status in 2011
- Baseline of very low take-up c15% in 2001 attributed to poor quality food from contract caterers

Solution

- Employ an in-house catering team
- Refit (previously illegal) kitchen
- Extend dining room to cope with demand
- Cashless system, multiple serveries
- Quicker deli bar for pupils doing lunchtime activities
- Employ a dietician to advise on menus
- Invest in an organic vegetable garden to allow pupils to become more involved in growing

Impact

- 90% paid take-up
- Reduced queue time
- 90% FSM take up

New catering team working in a new kitchen refreshed school dinners, supported by other programmes to engage pupils





Annoully olid

Strong leadership appears critical, whether it is in Academies or Maintained



Although not all Head teachers start equally engaged with school food, it does appear possible to persuade and motivate most of them

Caterer Perspectives On What Drives Change



The attitudes and impact of Heads has been explored with a detailed survey commissioned specifically for this review

Heads' Survey: Timing and Method

- The School Food Head Teachers' Perceptions Survey asked head teachers and senior managers from primary and secondary schools about their views on, and their school's policies regarding, school food
- Prepared on behalf of the Department for Education (DfE) by NatCen Social Research as part of the Centre for Understanding Behaviour Change (CUBeC) Research Centre.
- Data was gathered via a telephone survey
 - Carried out January-March 2013
 - The sample for the survey was primary and secondary schools in England
 - Interviews were completed with the head teacher where possible, or another member of the senior leadership team in secondary schools, if the head teacher was unavailable
 - A total of 202 interviews with primary schools and 202 with secondary schools were completed (the latter split exactly 50/50 between maintained and academy schools)
- NB the data collection period coincided with the emergence of the discovery that food containing horsemeat had been sold to consumers in Britain and in some cases had been present in school meals. It is possible that this may have influenced the responses of head teachers and senior managers in the survey.

Heads can be categorised according to their 'will' to deliver great food and their 'skill' in knowing how to achieve it

Segmentation Of Secondary Schools¹

Bubble size proportionate to number of schools in that category, value shown = % of respondents



1. Position on axes defined by survey responses on questions with a 1-5 scale: 'Will' defined by respondents' level of agreement with statements "I believe children eating healthy, nutritious food improves behaviour" and disagreement with "food is on my radar but not a priority"; 'Skill' defined by ranking of "how the school performs on taste", "how the school performs on affordability", "I am totally on board with the principle of good food, and have already worked hard to achieve it"

Source: 'School Food: Head Teachers' Perceptions Survey' - DFE / NatCen (2013), OC&C analysis

The skill and will of Heads appears to be a strong predictor of success, in the form of higher take-up and lower prices



51 -

The high will / low skill group deserves attention given its apparent potential

High Will / Low Skill

Characteristics

- Current results
 - Quite low average take-up (37% vs a survey average in the low 50%s)
 - Prices slightly above average (but not as high as the low skill / low will segment)
- Characteristics
 - Slight bias to being in the South
 - Fewer academies than the other segments.

Provision Model

- Typical provision model used
 - Almost all the high will / low skill group use a Local Authority or contract caterer provision model – less than 5% of them provide school food in-house ...
 - ... In contrast to the high will / high skill group (65% in-house)
- Commonest reasons for choice of provision model:
 - High will / low skill are "we inherited it" (44%), "financial reasons" (22%) then "because we had to" (19%), whereas
 - High will / high skill "quality" (43%) then "financial reasons" (39%).

Implications

- The high will / low skill group is important, partly because if only they can be helped, they have the enthusiasm and desire to do great things with food, so there should be improvements that can be unlocked without having to win the argument about food's importance compared to other things
- The schools in the high will / low skill still have a reasonable frequency of breakfast clubs, growing programmes and so on – there is no shortage of effort ...
- They appear to need two things:
 - Help to explore how to improve the quality and appeal of the school lunch they're getting, whichever provision model they currently have
 - Confidence to push their provider for something better, or to consider an in-house set-up

Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers
- The Economics Of School Food
 - Variations In Profitability
 - Suppliers' Perspectives
 - Scope To Improve Economics
 - Free School Meals
- Challenges
- Regulation And Standards
- International Examples

- 1- - - - V

Several different types of organisation are involved in providing school food, including a range of private-sector organisations





A mix of provision models exists, with LAs involved in some way – either delivering the food or managing the contract - for the majority of meals served

Percentage Of Meals Served By Provision Model

Contractor Provider		Description	% Meals Served	
	In-house	Local Authority has own catering service, which it uses to supply schools in the area	39%	
LA	Third-party	LA contracts third-party caterer to supply food to schools in the area	18%	
School	LA	 School uses LA catering provision – but is indifferent to whether this is an in-house or third-party catering service 	17%	
	Third-party	School contracts directly with third-party catering company	14%	
	In-house	School has in-house catering service	12%	
No Catering		 School does not provide catering services 	0.4%	

Changes in the mix of model have been relatively slow in the last five years



3. Survey sample of 1,300-3,000 secondary schools (varies by year)

Source: SFT annual surveys, OC&C analysis

Crucially, the price of school lunches does not cover the cost of producing them – there is a loss made on school lunches of 10% (£140m) – which must come out of the budget of the school or local authority

Profitability of School Dinners



Source: SFT, DfE, OC&C analysis

57 -

Within a Local Authority, profitability is generally higher at schools that serve more meals per day ...



... although there are still wide variations in the cost of producing a meal that are not fully explained by volume served

Cost of Producing a School Lunch for Schools Within the Same LA

£, per meal



Case Study – Unnamed Local Authority, Primary Schools

Provision model does not determine cost – schools with in-house provision achieve average cost levels very similar to LAs producing much higher total volumes each day

Example Food and Labour Costs Per Meal

Pence Per Meal



olio vibacad

An average primary school's meal costs are predominantly food (particularly meat) and labour



An average cost structure translates into an annual loss at current take-up rates

Economics Of An Average Primary School

	Annual Revenue And Cost	Components Of Cost
Revenue	£41,300	46% take-up in a school of 240 pupils = 110 meals per day, lunch charged at \pounds 1.97
Cost		
Food	£17,970	92p per meal spent on ingredients
Labour	£25,100	14 hours worked each day (with productivity of 8 meals per hour) and staff earning £8-11 per hour
Overheads	£5,030	Various cost items including utilities, equipment maintenance, compliance and administration
Profit (Loss)	(£6,800)	

Across a group of primaries served by the same LA, the number of meals per day served per site is clearly a driver of the average cost per meal

Cost Per Meal by Volume Of Meals Served Per Day Case Study – Unnamed Local Authority, Primary Schools Average Cost per Meal, £, Primary schools Food Labour 0.91 0.67 1.58 >150 0.80 0.79 1.59 125-150 Meals Served per Day 0.96 0.82 1.78 100-125 0.94 0.89 75-100 1.83 <75 1.01 0.99 2.00 Cost per Meal (£)

The labour cost per meal, in particular, varies directly with volume

Cost Per Meal by Volume Of Meals Served Per Day Average Cost per Meal, £, Primary schools



Case Study – Unnamed Local Authority, Primary Schools

The effect of extra scale reducing labour cost per meal contributes significantly to the better profitability of schools serving more meals per day



Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers

■ The Economics Of School Food

- Variations In Profitability
- Suppliers' Perspectives
- Scope To Improve Economics
- Free School Meals
- Challenges
- Regulation And Standards
- International Examples

Wholesale is a relatively consolidated sector in Education, with the leaders able to take advantage of their significant scale in other lines of business

Leading Delivered Foodservice Providers¹



1. Delivered Foodservice covers Education (primary, secondary, tertiary), plus hotels, restaurants, other leisure, and hospitals Source: IGD, OC&C analysis

The contract catering sector is similarly consolidated, albeit with a long tail of small businesses that operate on a local basis



1. Caterer market share includes revenue from other educational institutions, eg private schools Source: GIRA, company accounts, OC&C analysis

Unsurprisingly given their scale, caterers are able to buy food ingredients much cheaper than retail prices

Comparison Of Buying Prices

	Supplier	Product	Brand / Quantity	Caterers' Price ²	Supermarket Price (£)	% Price Difference
	3663	Plain flour	OL 1x16kg	6.66	11.84	
		Puff pastry sheets 580 x 380mm	Jus-Rol 12x625g	11.31	18.75	
		All Bran	Kelloggs 4x700g	9.13	10.08	
		Rice basmati orig	Tilda 1x20kg	42.72	70.00	
		Pasta egg noodles medium	Sharwood 1x3kg	7.77	11.16	
		Apple juice	Sunpride 12 x1ltr	5.69	8.40	
Gracarias		Raisins dried	OL 4x3kg	24.19	34.44	
Grocenes		Almonds flaked	OL 1x1kg	7.99	9.90	
		Soya milk unsweetened	Alpro 24x500ml	13.12	10.00	
		Hash browns frz	McCain 8x1kg	9.84	18.88	
		Coconut milk	BI Dragon 12x400ml	6.56	23.90	
		Chickpeas in water	Fortuna 6x2.55kg	11.94	53.09	
		Peas economy frz	OL 4x2.5kg	26.56	12.80	
		Tomato paste	OL 12x800g	10.80	17.28	
			Sub-total	194.28	310.53	+60%
		Apples Granny Smiths	OL 1x1kg	0.79	1.95	
	Fresh Direct	Lemons	OL 20x1	4.20	5.00	
		Cucumbers size 12	OL 1x12	8.91	10.80	
Fruit & veg		Peppers red	OL 1x1kg	2.90	2.50	
		Broccoli	OL 5x1kg	8.57	12.50	
		Leeks	OL 5x1kg	7.70	10.00	
			Sub-total	33.07	42.75	+29%
	Rare	Chicken breast strips fresh	OL 1x1kg	5.18	6.90	
Moot		Pork minced fresh	OL 1x1kg	2.89	5.86	
meat		Beef minced lean fresh	OL 1x1kg	3.70	3.31	
		Lamb diced home-killed fresh	OL 1x1kg	7.19	12.50	
			Sub-total	18.96	28.57	+51%
			τοται	246 31	381.85	+55%

1. 'OL' = Own Label or unbranded product

2. Caterers' price based on benchmarks for buyers spending over £1m pa on ingredients

Source: Caterers' Price Index, Tesco.com, OC&C analysis

i9 **-**

However, despite their overall scale and share, the commercial providers do not extract significant profitability from school food

Operating Margin By Stage Of Value Chain EBIT Margin, %, average 2009-11



Annandis aliada

Efficient economics require more than scale; efficient menu design, rota management and contract structure all contribute

Caterers' Perspectives On Critical Efficiency Levers

	Large Caterers	Small Caterers
Menu Design and Buying Efficiency	 "Scale's definitely important. It's all about take-up supporting better economics that make everything else easier, eg batches of 150 meals vs batches of 75" "Buying cheaper cuts of meat can get you a major saving without sacrificing nutritional value" 	 "What gets expensive is the amount of red meat you have. Great vegetarian food would be significantly cheaper – you could take 20-30% off the food bill" "At my scale the buying economies don't change much between 1,000 and 10,000 meals a day" "We have to go through middlemen who take a commission, eg the guys doing fruit and veg take 10% margin. For dry produce it's probably 10% as well" "The risk with collaborative buying is that you lose control. You'd be dictated to by the supplier"
Labour Productivity	 "Skills are the biggest thing that holds us back, especially when taking over from an in-house team" We've experimented with offering CPU-type arrangements in tenders – but schools/LAs don't really understand the value" The workforce is a major challenge: badly paid, lacking skills. I think training could help – but if you pay minimum wage, you will get minimum wage" 	 "Labour costs have just been higher historically in the public sector than our rates" "A good caterer knows how many staff it takes to do what. It's carefully worked out. If there's a bit of overstaffing, you go to piece rate" "Buying peeled potatoes saves me 65p a kilo because of the labour cost I can take out"
Contract Shape	 "Multi-service contracts [Catering plus Cleaning or other services] are helpful, especially with academies" 	 "Bundling catering with other services isn't something we look for"
Capital Investment	 "Most contracts will specify some capex injection now, and we often find a need anyway, eg for new cutlery or better plates as well as the kitchen kit" 	"In some cases we'll revamp the kitchens. We're prepared to invest if we can see the return"
Caterers will selectively target those contracts with more potential for profit – and avoid those where they feel there is an inherent obstacle to breaking even

Caterers' Contract Preferences

Context

- Contract caterers are commercial organisations that need to run profitably
- Some contracts are likely to offer more potential (eg larger schools, those with underutilised kitchen and dining facilities)
- LAs managing contracts can make it difficult for caterers to target school contracts individually ...
- And should be able to structure contracts to align incentives between caterers and the LA or school

- "Compass and Sodexo were interested, but they wanted to cherry-pick the larger primary schools" – County Council
- "I've got schools that come to me and say 'can you do our catering?' I say 'No, sorry, because you've got a cook on a stupid salary'" – Caterer
- "With some schools in the Midlands, the pay scales are ridiculous" Caterer
- "In West Cumbria, a third of schools make a decent profit, a third make nothing, and a third make a loss. If I could choose which to run I'd make a fortune" – Caterer
- "We're selective about which contracts to bid for. Our business model depends on it" Caterer

School catering is a local business, ie the majority of costs are local, and a school can bring the business in-house without losing to larger organisations

Components of Cost	Local?	
Inspection	X	Needs to be independent, detailed from individual schools
Management Overhead	?	Some sharing of overhead possible between schools
Menu Planning and Purchasing	?	Meal planning can be done remotely – but need for parental involvement makes it more local
Training and Supervision	✓	Supervision needs to be on-site
Labour (Serving and Cleaning)	J	 Typically short shifts make labour pool very local
Labour (Preparation)	1	 Typically short shifts make labour pool very local
Ingredients	√ ?	 Some purchasing disadvantage versus larger (regional or national) organisations – although collaboration in buying groups of using terms negotiated by an LA can help
		Scope exists for competitive local sourcing, and seasonal produce, in some regions

The most appropriate business definition of school dinners is local

Components of Cost		Appropriate Business Definition					
	Local	Regional	National	International			
Inspection			1				
Management Overhead	✓	√					
Menu Planning and Purchasing	<u></u>	✓	(✔)				
Training and Supervision	1	1	(✔)				
Labour (Serving and Cleaning)	√						
Labour (Preparation)	V						
Ingredients	(√)	4					

Annendix slide

Larger schools, ie secondaries, still depend on a wider local ecosystem for achieving high levels of take-up and healthy outcomes



Customers

- Secondary schools are typically part of a local network and depend on primaries and the local community in several ways
 - Supply of pupils (on average 5 primary schools for each secondary)
 - Funding, indirectly via taxes or directly via payment for meals, plus sponsorship from local business
 - Non-financial support, eg volunteering for school events and activities
 - Confirmation of educational and health messages to pupils when outside school

Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers

■ The Economics Of School Food

- Variations In Profitability
- Suppliers' Perspectives
- Scope To Improve Economics
- Free School Meals
- Challenges
- Regulation And Standards
- International Examples

Price shocks have proved to be a useful tool for encouraging trial of school food, with sustained higher levels of take-up often following

Case Study: Reduced-Price Trial (Bolton LA)



In Bolton, several actions to improve staff productivity and reduce the cost base were essential to make lower selling price viable

Case Study: Key Elements Of Success In The Reduced-Price Trial (Bolton LA)

Productivity

- Improvements were crucial to making the numbers work: Elaine Long, Head of Bolton's School Meals Service explained: "To produce 10 or 20 more meals in a day doesn't really affect labour levels in reality it [labour cost] was about 10% more on average across primary schools and we managed to keep it at this level"
- To serve so many more meals that means the staff were able to produce on average 19% more meals for every hour that they worked. Training was essential to making this happen – 100% of the unit managers now have a level two (or above) qualification in professional cookery.

■ Scale and simplicity

- To reduce the cost of ingredients (and to help the productivity), menus were streamlined fewer choices, but all healthy ones, with an emphasis on sustainability and local supply from Lancashire wherever possible
- The increased scale 600-700,000 more meals per year also helped to reduce average food cost per meal
- On top of that, the overhead cost was now spread over more meals.

■ Commitment from the Council

- At £1.25, money is still tight, and to get back to the break-even level achieved at £1.80, Bolton Council thought it might need to move price back up further, towards £1.50, but in November 2012 voted to hold prices at £1.25 (even though, despite the higher take-up at £1.25, the total revenue generated at that level was lower than the money taken at £1.80)
- According to Cliff Morris, Leader of the Council, "We want to continue to help parents afford a healthy lunch in this tough financial climate. We are also trying to make a difference to the long-term health of our young people."

Source: SFT, Bolton Council, OC&C interviews, press reports

In several parts of the country, price shocks have proved to be a useful tool for encouraging trial of school food, with sustained higher levels of take-up often following

Impact Of Sharp Price Reductions

	Price Per	· Meal (£)	Take-up			
	Before	After	Before	After	Increase	
Bolton	1.80	1.00	34%	71%	+109%	
North Somerset	2.00	1.00	-	-	+75%	
Carshalton	1.80	1.25	20%	80%	+300%	
Dulwich Hamlet	180 (per term)	20 (per term)	72%	95%	+32%	



Making food production economic while reducing the prices charged depends on achieving greater labour productivity and efficiency in purchasing

Changes In Cost Per Meal As Meal Volumes Increase Pence per meal



Labour costs are driven by the range of tasks that need to be performed in the kitchen and dining hall, with a significant proportion of time needed for activities not directly involving food preparation

Example Rota For Kitchen And Dining Hall Tasks

	0830	0900	0930	1000	1030	1100	1130	1200	1230	1300
Α	Vegetables	Pudding	Washing Up	Main Course	Potatoes	Washing Up	Final Touches	Serve Lunch	Serve Lunch	Close Down Room
В		Pudding	Main Course	Main Course	Washing Up	Main Course	Final Touches	Serve Lunch	Serve Lunch	Close Down Room
С			Main Course	Main Course	Tuck Shop	Main Course	Final Touches	Serve Lunch	Serve Lunch	Close Down Room
D					Tuck Shop	Close Down Tuck Shop	Prepare For Serving	Serve Lunch	Serve Lunch	Close Down Room
E							Set Up Room	WashingUp	Washing Up	Washing Up
F							Set Up Room	WashingUp	Washing Up	WashingUp

Preparation	
Serving	
Washing Up	
Other	

Evidence of a very wide range of productivity levels achieved suggest opportunities to improve rota management in many schools



Practitioners suggest that training, motivation and scheduling are all areas where many kitchens can be run better

Cost Context

- "A rule of thumb in the catering industry is that you should be spending one third on your income on labour, one third on food, and one third on overheads plus your profit. In schools, you have half the money spent on wages, a quarter on food, and a quarter on overheads. The balance is way out of line"
- "High labour costs lead to less healthy foods. A lot of caterers use Uncle Bens. Why are they using that? Because they have contact time of £14/hour, so they try to minimise preparation time. Preparing swedes is a time-consuming process. You're better off buying muddy stuff and washing it and peeling it, but it takes longer to work stuff up from raw ingredients"

Areas With Room For Improvement

■ Workforce are a major challenge – badly paid, lack of skills – I think training could Investment help – but if you pay minimum wage, you will get minimum wage" "It's the biggest thing that holds us back, especially when taking over from an inhouse team" Skills "The quality of the kitchen manager is the biggest thing" ■ "The workforce consists of mums that like cooking, not professional chefs" ■ "On-site staff can become detached and lose motivation. You've got to re-enthuse Motivation them – not just with training but with support. Simple things like sitting with the team, discussing the food, and tasting it"

From a range of conversations with practitioners, and seeing the range of costs achieved, several levers could be pulled to reduce cost

Example Levers For Reducing Cost Per Meal

Optimise menu design

- Menus that are quicker for the kitchen staff to make
- Meals requiring cheaper cuts of meat (or simply less meat) ...
- ... Or sourcing cheaper ingredients, eg Class 2 vegetables (nutritionally identical to others but simply larger or smaller than retailers prefer)

■ Optimise purchasing

- Without changing the food bought, reviewing contracts with food suppliers to make sure that the school is getting the best prices available, that it is using its buying power effectively (eg in one contract rather than several)
- Increasing the use of non-branded goods
- 'off-contract' purchasing kept to a minimum

Buy at larger scale

- Making use of buying consortia in order to obtain cheaper prices from suppliers

■ Improve rota management

- Changing the way the kitchen staff work to help them operate more efficiently

By implementing a number of cost-saving changes, the cost of the average school meal can be reduced by c.25%

Estimated Scope For Reducing Cost Of An Average School Meal



£ per meal

Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers

■ The Economics Of School Food

- Variations In Profitability
- Suppliers' Perspectives
- Scope To Improve Economics
- Free School Meals
- Challenges
- Regulation And Standards
- International Examples

There have been several major pilots of Universal Free School Meals

Universal FSM Pilots: Newham and Durham





Take-up rose significantly (although still below 100%), and both LAs have been sufficiently convinced of the benefits to continue subsidies

Take-up Trend

% of Primary Pupils Eating, 2008-09 to 2011-12



Before / After Pilot Pilot Period

Independently, there was a similar pilot of Universal Free School Meals in Islington ...

Universal FSM Pilots: Islington



... With a similarly excellent growth in take-up

Take-up Trend

% of Primary Pupils Eating, 2008-09 to 2011-12



Run in parallel to the Durham and Newham work, the Extended-entitlement pilot in Wolverhampton was less successful

Universal FSM Pilots: Wolverhampton

Context

- DFE and Department of Health initiated pilots with several objectives
 - Widen access to school lunches with better nutrition than Packed Lunches
 - Test the impact on other health and educational outcomes
 - Identify the most effective way of expanding FSM provision
- DFE and DoH provided matched funding to LAs involved

Actions

- Extended FSM provision for Primary and Secondary pupils
 - FSM for children from families on Working Tax Credit and with household income below £16,000
- Two-year duration 2009-11
- Promotional campaign, some capex to improve equipment and facilities

Results

- Limited gain in take-up (only slightly better than nationalaverage increases)
- No measurable change in attainment
- Few gains in other outcomes

Source: DFE, OC&C interviews

There was less impact on take-up apparent in the Extended FSM pilot in Wolverhampton, attributable mainly to executional problems

Take-up Trend

% of Primary Pupils Eating, 2008-09 to 2011-12



- Problems identified with the execution of the Wolverhampton pilot:
 - Logistical difficulties, eg the length of the queues deterring some pupils from eating
 - Awareness of eligibility not 100% in a situation where the message was more complicated than in the Universal FSM pilot areas
 - Ongoing challenge of needing to persuade newly-eligible students to switch to FSM when some of their friends were not entitled

Under Universal FSM, academic attainment levels improved

Impact on Attainment

% of Pupils Reaching Expected Level in Key Stage 1 Tests, 2010-11

Newham

Note: simple before-and-after comparison not available



In addition, there was a positive impact on the perception of school food – as high quality and healthy

Impact on Parents' Perceptions Of School Food



Durham and Newham

% Rating School Food Good or Very Good, sample size of 734 respondents

Delivering the successes of the Universal FSM pilots depended on the commitment of a range of individuals, particularly Heads and kitchen staff

Caterer And LA Perspectives On Critical Success Factors

- Preparing to launch
 - "We only had 10 weeks to mobilise over the summer; it was fraught to say the least"
 - "With more than 200 primaries, often with quite small facilities, it was hard to analyse the need for new freezers, cookers, or extra storage"
- Making it a success
 - "It wouldn't have been successful without the Heads on board, eg allowing longer for lunchbreak"
 - "It must be part of the school day, not a service done to them"
 - "It was a partnership with our caterer they had to recruit 150 people extra, deal with all the unexpected things that happen with so many more meals being eaten, and handle things like a lot more special dietary requirements [over 100] coming to light"
- Embedding the changes
 - "After the pilot we had to do a wave of marketing to parents to explain that we were going back from free to paid – it had been long enough that some of them had forgotten"
 - "We've worked hard to keep the cost down to £1.50, partly subsidised by the Primary Care Trust given their public health agenda"

The logistical challenge of handling a significant step-up in take-up was considerable, and required some adjustment to the school timetable as well as deploying more kitchen staff



Despite the strong evidence of worthwhile results, the pilots were costly in absolute terms

Scope And Impact Of Major Free School Meal Pilots 2009-11

	Newham	Durham	Wolverhampton
Pilot Type	 Universal FSM – Primary schools 	 Universal FSM – Primary schools 	 Extended FSM Primary and Secondary
Pupils in area	55,880	72,256	53,200
Pupils newly eligiblefor FSM	36,546	57,552	6,343
Cost	£12.1m	£16.6m	£1.2m
Costper pupil	£217 pa	£229 pa	£37 pa

Pilot Costs

Concerns About Cost Levels

- 1. Absolute level of funding needed for Universal FSM
- 2. Cost / benefit when compared to other programmes (eg literacy initiatives) when measured in terms of pounds per gain in attainment
- 'Deadweight' cost, ie government paying for meals that parents would have bought anyway (estimated at c30% of the cost of the Universal FSM pilots)

Source: DFE pilot review, press coverage

97 -

The other question-mark about the Universal FSM trials is why take-up did not reach 100% - surveys suggest that even with affordability addressed, the needs for choice, appealing food and convenience were still relevant



Reasons For NOT Taking Free School Meals

Source: SFT, DFE, OC&C analysis

Contents

Historical Context

■ Who Eats What, And Why

■ Take-Up Patterns And Drivers

■ The Economics Of School Food

Challenges

- Regulation And Standards
- International Examples

Beyond the economic challenges, there are several other issues that need to be addressed in delivering lasting change to school food

1. There are other food-related issues that need to be addressed

- 1. Childhood obesity and lifetime of consequences that result from it has been steadily increasing in recent years
- 2. Food poverty remains a widespread problem, which not only heightens the importance of ensuring as many children as possible eat a healthy school lunch, but also appears to be a cause of many children missing breakfast and then being liable to snack in the mornings rather than eat a balanced meal

2. Delivering change is difficult partly because no single group has the scale or influence to impact all schools

- 1. The ongoing trend for schools to switch from Maintained to Academy status increases the importance of Heads having the will and skill to improve school food (especially where Academies switch away from LA food provision)
- 2. Most of the supporting organisations that exist (and do excellent work) are too small to reach the majority of schools in the country
- 3. Jamie Oliver's efforts in 2005 were invaluable but need further support if the momentum is to be maintained
- 3. The move to Delegated Funding presents a threat to the financial stability of some schools

More than one in four children is overweight or obese, and that proportion increases as children get older

Childhood Obesity, by Age %



slides

Children are gaining more weight at school now than they have in the past six years

Childhood Obesity, in the UK 2006/7 – 2011/12 %



International comparisons also suggest that overweight children in the UK are more likely to retain that weight as adults than children in other countries



Annandiv eli

The context for current concerns about food poverty is the evidence that for the poorest households spend much more of their disposable income on food

Proportion Of Household Income Spent On Food



There has been a sharp rise in the number of people served by foodbanks



105 **–**

Teachers surveyed recognise that many children frequently arrive at school hungry, with apparent worsening attributed largely to economic reasons

Teachers' Perceptions Of Child Hunger

2012



1. "Approximately what percentage of children do you estimate arrive hungry or malnourished?"

- 2. "Has the prevalence of hungry pupils identifiably increased or decreased in the past 2 years? Would you say this increase is ?"
- 3. "Which of the following are factors in the increased prevalence of pupil hunger?"

Source: The Guardian Breadline Britain Survey; OC&C analysis

11%

Other

44%

Lack of

family

time

41%

Benefit

cuts

According to the Children's Society, there are c700,000 children living in relatively poor households but still not qualifying for FSM

Estimates For Poor Children Not Qualifying For FSM




The current benefits structure (before Universal Credit) involves a disincentive to earning more because FSM entitlement entirely disappears above a threshold



Issues For Policymakers

- For low-income households with multiple children, FSM has very significant value (c£10 per child per week)
- Current cut-offs create a benefits trap in which they would need a stepchange in earnings to compensate
- Some form of off-set is needed to encourage moving to higher-paid work without suffering a cut in net income, eg by reflecting FSM value in the 'income disregard' feature of Universal Credit

1. Example based on single-parent household with three children

2. FSM entitlement is often linked to other benefits, eg school uniform allowances and discounts for using local leisure facilities, which might also be lost

Source: Children's Society (Fair and Square report)

Decision-making is already quite fragmented – even the largest 30 Local Authorities serve only 50% of pupils in total

Number Of Schools By LA By Region

Number of Schools in Each English LA, 2009

1,135	3,245	2,306	2,118	2,407	2,685	1,085	1,644	3,677	2,476
37	64 67	69	26 96	76	57 53	5 62	56	44 54 67	421
40 52	7276	83	109	<u> </u>	75 /1	64	<u> </u>	67 70	72 39
56	8691	89	115	99	215	60	63	83 80	83
59	95	100		102		09	72	87	92
74	103	117	301	106	264	76	76	112	- 115
	<u> </u>	125		112		81	78	213	153
78	112	125		113	366		79	250	194
83	120	153	328	114		84	80		
	120	154		193		88	86	314	264
93	124	172		0.40	449		87	323	
103	172	172	356	248		89	87	020	283
105	175	199		054			90	474	
	207			251		90	91	474	200
192	327 206			541	90	91		239	
	220		364	390			100	560	
	330	270				95	108		318
							100		
268	626		423		594	95	135		
	020	397	720	427		07	4.4.4	652	397
						97	144		
North	North	Vorkehiro /	Fact	West	East of	Inner	Outor	South	South
Fast	West	Humber	Midlands	Midlands	England			East	West
-400		. 10111001			Ligidid	20110011	_0.10011	2000	

That fragmentation is increasing with the very rapid ongoing shift from Maintained to Academy status

Growth in Academies, 2002-12

#



There are several distinct types of academy, some with charitable roots and others which are part of commercial enterprises – and very few run more than a handful of schools

Academies and Free Schools By Type, March 2013



Leading Sponsored Academy Chains

	Number Of Academies					
	Primary	Secondary	Total			
Academies Enterprise Trust (AET)	26	24	53			
E-ACT	9	19	28			
United Learning Trust (ULT)	2	21	23			
Oasis Community Learning Trust	10	12	22			
The Ormiston Trust	1	18	19			
School Partnership Trust	9	6	16			
The Kemnal Academies Trust	13	3	16			
Harris Federation of South London Schools Trust	2	12	14			
Greenwood Dale Foundation Trust	7	5	13			
Absolute Return for Kids (ARK)	3	10	12			
Cabot Learning Federation	2	6	8			
David Ross Education Trust	4	4	8			

The recent pattern of contract awards shows academies increasingly procuring catering directly, rather than using the local authority

Trend In Catering Contracts Awarded By Academies





÷

There are numerous supporting organisations – 'The Gang' – doing excellent work contributing to efficient kitchens, healthier food and a better understanding of nutrition

Principal Members Of 'The Gang'

	Year Founded	Mission		Principal Activities		Legal Status		Scale Of Activity
All-Party Parliamentary Group on School Food	N ot kn own	"To promote and provide a forum for the discussion of issues relating to food and health in educational se trings"	•	Discussion of issues related to school food	-	Parliamentary discussiongroup	•	20 MPs involved Nofunding - APSE provides se cretariat
Chefs Adopt A School	1 990 (by the Aca demy of Culinary Arts)		•	'FEAST practical learning programme run in schools	•	Chailty	•	R ea ches 21,000 children pa
Caroline Walker Trust	1 988	"Improving public health through good food"	-	Publications, newsletters and le ctures	•	"virtual charity"	•	Nooffice 1 paid part-time administrator
Children's Food Trust	2005 (as School Food Trust)	"Help protect every child's right to eat better – and so, to do better"	•	Specialist a dvice, training and support for anyone providing food to children School and communityLet's Get Cooking dubs	•	Chaity	•	£4.7m pa budget
Child Poverty Action Group	1965	"To al leviate poverty and social exclusion"	-	Research, lobbying, training courses, advice lines	•	Chaity	•	£2.4m pa budget 35 staff
Children's Society	1 881	"To make childhood better for all children in this country"	:	Wide range of programmes and centres Eg 'Fair & Square' FSM petition / campaign Explicitly informed by Church of England values	•	Chailty	:	£28.3m pa budget 501 full-time 570 part-time
Food For Life	2006	"Revolu lionising school meals, reconnecting children with where their food comes from, and inspiring families to grow and cook food"	•	Cate ing Mark a ward scheme + roll- out of practical cooking and growing programme in schools	•	Partnership (led by Soil Association, Health Education Trust, Garden Organic, the Focus on Food Campaign)	•	£16.9m Lotterygrant until 2011
Garden Organic	1954 (as the Henry Doubleday Research Foundation)	"Promote organic gard ening, focusing on individual, community and school gardens throughout the UK"	•	Rese arch and de velopment programmes (internationally) Campaigns on health, sustainability, climate	•	Chaiity	:	£3.2m pa budget 78 staff
Jamie Oliver Foundation	2002	"Inspire people to reconnect with food"	:	Food e ducation programmes in schools Youth employability work Community cooking projects	•	Chaiity	-	
Local Authority Caterers' Associa tion	1 999	"Together, we achieve excellence in school food"	-	Represent the school food industry (providers)	-	Company limited by guarantee	•	750 cate ring man agers
Magic Breakfast	N ot kn own	"De live ring fue I for I ear ning "	•	Provision of free breakfast for schoolchild ren	•	Chailty	•	6,000 children per day (200 schools) Funded by commercial sponsors – c£300k pa budget 4 staff
School Food Matters	2 008	"To ensure that every child enjoys fresh sustainable food at school and understands where the irfood come sfrom"		Save Our School Food Standards campaign	•	Chailty	•	Grant fun din g + some project management + me mbership fees 1 FTE (at lowest pint 2010)

Most of The Gang focus on specific aspects of nutrition, cooking or growing, and lack scale or the ability to influence all aspects of food in schools

Core Activities Of 'The Gang'

	Food Provision	Advice / Support On Food Provision	Kitc hen Staff Quality	Growing	Cooking	Nutrition (advice, standards)	Monitoring	Campaigning / Research / Information
Caroline Walker Trust		✓						✓
Chefs Adopt A School					✓			1
Child Poverty Action Group								✓
Children's Food Trust			1					1
Children's Society								1
Food For Life		✓	1	1		1	✓	✓
Garden Organic				1		✓		1
Jamie Oliver Foundation			1	1	1			1
LACA	√		1					1
Magic Breakfast	√							1
School Food Matters		1		1	1			1

Jamie Oliver's work from 2005 was an important catalyst that joined a diverse group of organisations connected with school food - most small and with limited funding



The injection of funds from 2005 was valuable, but unlikely on its own to achieve sustained improvement across the disparate school food system

Additional Investment Pledged By Government 2005

	Action	Results
£280m		
School Food Trust	 SFT established with remit to advice parents and schools on best practice £60m allocated 	 Numerous valuable programmes supported by the SFT SFT status changed 2012 (and renamed the CFT); funding reduced to £4.7m pa
Equipment Capex	Some funding allocation to upgrade kitchen equipment in poorer areas	Improvements made in large number of schools – although current perception is that many sites need further spend
Staff Training	 Training programme rolled out for kitchen staff Some funding to cover extra hours 	Improvements evident in gradual productivity gains, although range remains very wide and consensus is that further investment is needed
Food Ingredients	 Minimum spend per meal set 50p at Primary level 60p at Secondary 	 Average spend on ingredients increased across the school food system
	Other major changes Nutritional standards in September 2006 (with budget attached) Voluntary code of cond advertising of junk food	: htroduced but specific luct for d to children

Under the old funding model, Local Authorities were pivotal in allocating money to schools and in determining the level of overhead provided

Old Funding Model



1. eg non-DSG spending on education, sponsorship, charitable donations, funding from other government departments, endowments, etc Source: OC&C analysis

The Delegated Funding model is much simpler, but further reduces LAs' involvement in school food

Delegated Funding Model



1. eg non-DSG spending on education, sponsorship, charitable donations, funding from other government departments, endowments, etc Source: OC&C analysis

Although the total amount of money directed to the school system is not intended to change, several problems could arise

Implications For School Food Provision

Possible Problems

- Economic challenge for some schools
 - Cross-subsidy removed, ie the formal link between profitable and loss-making schools no longer exists
 - Clearer sight of the cost of providing school food may prompt cash-strapped schools to seek to cut costs or charge more
- Economic challenge for LA service
 - Viability of LA provision will be undermined if previously more profitable schools decide to switch to private provision ...
 - ... Potentially creating a vicious circle as the LA system is left with smaller schools and weaker economics overall (or decides not to serve smaller schools at all)
- Less incentive for LAs to subsidise the school food service, given reduced visibility of (and accountability for) it

Possible Benefits And Safety Nets

- Increased simplicity and autonomy
 - Greater accountability at school level, where Heads should have the best view of what will work in their environment
 - More direct reward for any schools able to improve the quality of their school food (ie retained profit)
 - Clearer incentive for individual schools to drive take-up
 - Simpler administration (which should lead to lower running cost)
- Measures to limit problems
 - Minimum Funding Guarantee: no schools can lose more than 1.5% of funding per pupil for at least 2013/14 and 2014/15
 - Pupil Premium intended to channel money to the neediest children, without complex calculations at the LA level
- More money in total being invested by the DfE in schools (c£1bn in cash terms)

Efforts have already been made to ensure that schools continue to offer a food service, but none appears to be a perfect solution

Mechanisms For Ensuring Continuation Of School Food Provision Already Considered

Communication

- Schools do not want to break the law, so publicising the current legal requirements more effectively appears logical, ie:
 - You have to offer FSM children a meal
 - That meal must comply with the standards
 - This means it should be a hot meal (as it would be hard to make one that complied otherwise)
 - Economies of scale are such that if you're providing one hot meal you might as well provide a full service
 - Therefore you should be providing a full hot meals service
- Drawbacks?
 - Multi-stage message difficult to communicate clearly
 - Schools might argue that a cold lunch did meet the standards
 - Need for monitoring and enforcement

Legislation

- Require schools to deliver hot food services through legislation, on the basis that this will mean local forums have to prioritise this. Options include:
 - 'Freezing' the system as it is so schools cannot change their provision. This is likely to be partially effective – ie it could protect existing catering services, but this
 - Would not make school reinstate them [and schools might rush to change before the law came into effect]
 - Might stifle innovation by keeping everything static
 - May be difficult to enforce (as you would have to know what the service was like now to check it hadn't deteriorated)
 - Setting a requirement to provide a standard of hot food in law. Clearer than freezing the system, although likely to be challenged by schools who [for some reason] cannot provide hot catering. The powers to set regulations for this exist in the School Standards & Framework Act 1998. Still a question about enforcement and monitoring (as now)

Another potential obstacle to good food provision is limitations of kitchen and serving space – recent building regulations appear to deprioritise food

Possible Impact Of Building Regulations

1999 Regulations

- Standards for School Premises Act 1999 stipulated that school buildings
 - must provide appropriate ancillary facilities
 - must allow for the preparation and serving of food and drinks and the washing-up of crockery and other utensils

2012 Regulations

- New School Premises Regulations 2012 appear less strict
 - Stipulate only that school premises must be maintained to a standard that ensures 'health and safety and welfare of the pupils
 - No clear specification of the provision of a kitchen or dining facilities
- October 2012, new templates for school buildings released
 - 15% (secondary) smaller than previous requirement
 - 5% (primary) smaller than previous requirement

Risk of kitchen and dining space being deprioritised, or simply too small to handle higher take-up?

Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers
- The Economics Of School Food
- Challenges

Regulation And Standards

International Examples

Although food-based and nutrition-based standards involve different principles, they share the same goal: improved nutrition

Different Types Of Standard

Food-Based	 Define the types of food that should be offered and in some cases the frequency Intended to be relatively simple to understand, apply and monitor 		
	Define the proportion and amount of nutrients that should be received on average from school food over a week or more		
Nutrition-Based	Intended to be scientifically accurate in promoting the healthiest reasonable diet		
	Designed to provide a nutritional safety net for those children receiving Free School Meals, or those with erratic eating habits (partly motivated by duty-of-care principles)		

Common objectives:

- Deliver nutrition
- Support improved health outcomes for schoolchildren

Shared principles:

- Maximise the likelihood of school food being healthy – and consumed in healthy quantities
- Limit the availability of intrinsically unhealthy foods

The critical differences are in how they work

Mechanisms For Implementing Standards

	Tools	Training / Expertise	Monitoring
Food-Based	 Simple checklist of dos and don'ts 	 Minimal training (eg on definitions) 	 Visual checks of food served Totals across a menu cycle
Nutrition-Based	Specialist software	 2-3 days' training to use software Or, trained dietician to assess menus 	 Visual check not sufficient Scientific analysis of meals served

124 -

Nutrition-based standards set target levels for the nutrients delivered in the school menu

Nutrition-Based Standards

	Maximum or Minimum	Primary Pupils (ages 5-11)	Secondary Pupils (ages 11-18)
Energy (kcals)		557	646
Fat (g)	Max	21.6	25.1
Saturated fat (g)	Max	6.8	7.9
Total carbohydrate (g)	Min	74.2	86.1
Non-milk extrinsic sugars (g)	Max	16.3	18.9
Fibre (g)	Min	4.5	5.2
Protein (g)	Min	8.5	13.3
Iron (mg)	Min	3.0	5.2
Zinc (mg)	Min	2.5	3.3
Calcium (mg)	Min	193	350
Vitamin A (µg)	Min	175	245
Vitamin C (mg)	Min	10.5	14.0
Folate (µg)	Min	53	70
Sodium (mg)	Max	595	714

Food-based standards define the appropriate frequency for offering different types of food

Food-Based Standards

	School Lunches	Other School Food (Mid-morning, After-school clubs)					
Fruit and vegetables	Not less than two portions per day per pupil	Fruit and vegetables must be provided in all school food outlets. These can include fresh, dried, frozen, canned and juiced varieties					
Oily fish	Oily fish should be provided at least once every three weeks in both primary and secondary schools	No standard					
Meat products	Only one meat product, (manufactured or homemade), from each of the four separate groups (burgers / chopped meat, sausages, meat pies, shaped / coated meat product) can be provided across the school day within a fortnight						
Starchy food cooked in fat or oil	Starchy food cooked in fat or oil should not be provided on more than three days in a week across the school day						
Bread	Bread with no added fat or oil must be provided on a daily basis	No standard					
Deep-fried food	Deep-fried food, (including those deep-fried or flash-fried in the kitchen or manufacturing process), should not be provided more than twice a week						
Salt and condiments	No salt shall be available to add to food after the cooking process is complete	Salt must not be provided at tables or service counters Condiments such as ketchup and mayonnaise must only be available in sachets or individual portion of not more than 10g or 1 teaspoonful					
Snacks	Savoury snacks high in salt and fat, such as crisps, are no longer allow	Snacks such as crisps must not be provided. Nuts, seeds, vegetables and fruits with no added salt, sugar or fat are permitted					
Confectionery	Confectionery should not be provided as part of school lunche	es, or at any time of the school day					
Cakes and biscuits		Cakes and biscuits must not be provided at times other than lunch					
Drinking water	There should be easy access at all times to free, fresh drinkin	ig water					
Healthier drinks	Healthier drinks include water, low-fat milk, fruit juice and combinations of these	Only healthier drinks are permitted throughout the school day					

LAs, caterers and others closely involved in delivering school food typically express a preference for food-based standards

NBS are impractical ...

- "Nutritional standards are completely impractical and hard to check"
- "Standards are very hard to measure in secondary schools"
- "It's irrelevant academic utopia"

... Don't guarantee results ...

- "The blooming nutritional standards all need to be chucked out. Too much worrying about a gram of zinc. After 2005 it was a sledgehammer to crack a nut"
- "It's legislation to the lowest common denominator"
- "The nutritional standards are based on what's offered, not what's actually taken. Pupils might have a jacket potato with tuna, and have that 190 days a year"

... And can be obstructive

- "The NBS stifles creativity"
- "Anyone that tries to defend NBS clearly hasn't worked with school food"
- "I wish I could spend less time on the computer and more on making food tasty and healthy"

- "Food-based standards are easier to administer, as well as being easier for someone else to inspect / monitor"
- "Simple FBS are what we need"

One issue with nutrition-based standards is simply the cost and complexity of ensuring a menu is compliant

Compliant Menu Creation



Practical examples show that FBS-compliant menus in a sample of primary schools largely meet NBS

Assessment of How Closely FBS-Compliant Menus Meet NBS: Primaries



FBS-compliant menus in Secondaries also largely meet NBS, with modest alterations needed in some cases to sodium or iron levels

Assessment of How Closely FBS-Compliant Menus Meet NBS: Secondaries



One benefit of simplified (food-based) standards is that they can be more easily applied to other areas of life

Value Of Food-Based Standards To Environments Outside School

Parents / Home	 Parents and children able to apply standards used at school to domestic meals Children increasingly able to recognise healthy food types on their own
Hospitals	 Food-based standards easier to apply in institutions with limited catering facilities Increased likelihood of children eating well should ultimately reduce the need for medical care
Clubs and Associations	 Healthier children more likely to pursue extra-curricular activities (at school and beyond) Food-based standards provide simple rules of thumb that can be applied to informal catering (eg at sports events)

Since the standards were introduced, the food eaten has on average become healthier

Evaluation Of Food Eaten Against Nutrition-Based Standards

	Infants (4-7 years old)			Juniors (8-11 years old)			
	NBS	Before (2005)	After (2009)	NBS	Before (2005)	After (2009)	
Energ y (kJ)	1941-2145	1962	2025	2212-2244	21 17	2075	
Energ y (kcal)	469-514	469	484	529-585	506	496	
Protein (g)	5.9	16.1	18.4	8.5	17.2	18.8	
Carbohydrate (g)	65.2	62.7	70.9	74.2	68.1	71.9	
NMES (g)	14.3	14.1	13.8	16.3	15.6	14.5	
Fat (g)	19.0	18.8	15.9	21.6	20.1	16.6	
Salt (g)	6.0	6.6	6.0	6.8	7.1	6.3	
Fibre (g)	3.9	4. 1	5	4.5	4.4	4.8	
Sodium (mg)	357	699	515	595	757	545	
Vitamin A (µg)	140	245	349	175	241	327	
Vitamin A (mg)	10.5	20.0	25.3	10.5	21	22.5	
Folate (µg)	35	51.0	66.5	53	55	63	
Calcium (mg)	1 58	180	204	193	198	205	
Iron (mg)	2.1	2.3	2.3	3.0	2.5	2.4	
Zinc (mg)	2.3	N/a	2.1	2.5	N/a	2.2	

Meets Standard
Does Not Meet Standard

Improvement from 11 to 13 nutrients meeting standard

Improvement from 7 to 10 nutrients meeting standard

Source: Nelson et al, MRC Human Nutrition Research / Nutrition Works!

Teachers recognise improvements in children's behaviour and attention as a result of the changes that have happened since 2005

Perceived Impacts On Behaviour And Attention

"Because the children aren't being stuffed with additives they're much less hyper in the afternoons now"

- Head, Kidbrooke School

- "Children enjoy the food and talk about it more than they did in the past. They seem to have more energy and can concentrate for longer"
 - Classroom teacher, Kidbrooke School
- "As our children go through Secondary, they won't have tried a Turkey Twizzler – and they will have a taste for good healthy food"
 - Head, Millfield Community School, Hackney

Assessment of Absenteeism And Attainment Impacts In Greenwich

- Significant improvement in attainment 2004-06 (comparing Greenwich to a control group in 5 other London Boroughs)
 - Percentage of pupils reaching Level 4 in Key Stage 2 English +4.5%
 - Percentage of pupils reaching Level 5 in Key Stage 2 Science +6%
 - (Some other improvements within the bounds of statistical error)
- Absenteeism fell sharply
 - Authorised absenteeism down c15%
 - Unauthorised absenteeism unchanged (but Authorised considered more likely to reflect genuine sickness therefore a better proxy for health levels)

However, many other things contributed to the improvement post 2005



Regulation does not guarantee that food will taste good, nor does it deliver the other things that are important to take-up

Impact Of Regulation On Drivers Of Take-Up

	Nutrition	Taste	Physical Environment	Social Experience	Value for Money	Brand
Delivered by Regulation?	?	×	×	×	x	x
	 Menu can be controlled but not the food selected or eaten 	Nutrient content no guarantee of flavour	Attractiveness of dining hall and queuing efficiency not affected	Regulation does not deliver convenience or assist in eating with friends	Nutritional standards unlikely to reduce cost or be recognised as better value for money	Regulation not recognised as a desirable brand attribute for school food

Similarly, regulation itself does not deliver the key enablers of the drivers of take-up

Impact Of Regulation On Key Enablers



Nor does it drive the behaviour of supporting groups and organisations

Impact Of Regulation On Supporting Groups

Example Supporting Groups	Core Activities	Influence of Regulation On Core Activities
Food For Life	AdviceCertification	O
School Food Matters	CampaigningAdvice on menu design and procurement	0
Magic Breakfast	Provision of breakfast	•
Garden Organic	Promotion of food-growing programmes	0
Jamie Oliver	■ Campaigning	O



Michael Pollan's more holistic approach to food and eating – structured as 64 'Food Rules' – includes several themes directly relevant to school food

Relevance Of Michael Pollan's Food Rules

	Example Rules	Themes Relevant To School Food
"Eat Food"	 Don't eat anything your great- grandmother wouldn't recognise Avoid food products that have more than 5 ingredients Eat only foods that will eventually rot If it came from a plant, eat it. If it was made in a plant, don't 	 Healthy food generally involves recognisable, natural ingredients Processing and additives should be minimised Simple foods are preferable
"Mostly Plants"	 22. Eat mostly plants, especially leaves 27. Eat animals that have themselves eaten well 36. Don't eat breakfast cereals that change the colour of the milk 39. Eat all the junk food you want as long as you cook it yourself 	 Most nutrition is available from plants There is much less need for meat than the balance of modern diets suggests Understanding of food and involvement in its preparation is valuable
"Not Too Much"	 46. Stop eating before you're full 51. Spend as much time enjoying the meal as it took to prepare it 59. Try not to eat alone 63. Cook 	 Quality is more important than quantity Eating should be given enough time for attention to be paid to the food itself Food, and the social occasions surrounding food, should be enjoyed

Too small a percentage of children eats enough of a typical 3-week menu cycle for its nutritional content to be a reliable indicator of what they consume

% of children eating the theoretical 3-week menu



Although academies have greater freedom about the food they provide, there are incentives for them to deliver good nutrition

Caterers' Perspectives On Academies

Pressure On Academies To Deliver High-Quality School Food
Parental pressure
Head / teacher interest in pupil behaviour and attainment
 Economic benefit of an efficient, high take-up environment

Observed Response Of Academies

- "They're not abandoning standards completely; overall, the argument that good nutrition leads to good behaviour has been won ... and it would be a PR disaster to be seen to slide too far backwards"
- "On food, I think they'll be fine; I'm seeing much more interest than from [maintained] secondaries"
- "It's helped by the ability of caterers to put capex in and make a really visible change. For example, for secondary pupils it feels grown-up to have a Costa on site"
- "I think they recognise it's a competitive edge"
- "Academies respond to economic arguments more and more"

Contents

- Historical Context
- Who Eats What, And Why
- Take-Up Patterns And Drivers
- The Economics Of School Food
- Challenges
- Regulation And Standards

International Examples

Around the world there are very mixed results from the different approaches taken to managing take-up, nutrition and obesity

International Comparisons: Outside Europe

	Nutrition Standards	FSM Policy	Average Price (£)	Take-Up %	Government Funding	Contract Structure	Obesity %	Other Features
Australia	■ No – guidance only	■ No	£1.29	14%	 Limited – some Health Eating Grants for schools 	 Mainly private contracts 	23%	•
Brazil	Yes – meals should provide 15% of a child's daily nutrient nee ds	■ Yes - 100%	n⁄ a	46%	 Federal National School Meals Programme 	 Decentralised 	22%	 70% of Federal funds must be spent on fresh fruit, veg, minimally processed foods
Canada	 No – guidance only 	■ No	£0.36	13%	■ No	•	28%	•
Chile	 Yes – specified number of calories per meal type 	■ Yes - 100%	£0.30	35%	 School Feeding Programme targets low- income children 	 National Board a wards contracts to private sector 	28%	•
Hong Kong	 No – guidance only (focus on Primary) 	 Yes – some support for low- income families 	£1.10	68%	•	 Mainly private contracts 	n⁄ a	 Secondary students typically eat offsite
Japan	■ n/a	 Some subsidy for low-income 	£1.31	80%	 LAs cover labour cost and overheads 	■ LAs	15%	 Parents pay ingredient cost 50% ingredients sourced locally
USA	Yes	 Yes – 26% of meals free or subsidised 	£0.98	70%	 National School Lunch and National School Breakfast Programs target low-income groups 	 School districts or private contracts 	35%	•

Around the world there are very mixed results from the different approaches taken to managing take-up, nutrition and obesity

International Comparisons: Europe

	Nutrition Standards	FSM Policy	Average Price (£)	Take-Up %	Government Funding	Contract Structure	Obesity %	Other Features
Finland	 Yes – meal must deliver 1/3 of child's daily food requirements 	Yes -100%	n/a	94%	 Central govt (Dept of Social Affairs and Health) pays 70% of cost, local govt the rest 	■ n/a	21%	 Average cost per meal £1.66
France	No – guidelines only	 Yes – free or subsidised (bas ed on means- tested) 	£2.00	50%	 Ministry of Education subsidies cover half the cost 	LAs or private	14%	 Average cost per meal £4.00 Vending machines banned Min 45 minutes lunchbreak
Germany	■ n/a	Yes -100%	£1.21	n/a	■ n/a	■ n/a	20%	 Germany Slim Kids campaign aimed at raising knowledge of healthy diet and nutrition
Italy	 Yes, schools obliged to source organic, good- quality ingredients 	 Yes – only the poorest families (<€2.5k pa) 	£2.96	100%	■ n/a	■ LAs	32%	 Schools have a Canteen Commission of parents overse eing good stan dards
Ireland	 Yes – LAs can opt in to the School Meals Scheme guidelines 	 Yes – means tested 	£1.00	18%	 Limit imposed on how LAs can recoup (50% of spend) 	■ n/a	n/a	•
Spain	No – guidelines only	 Yes – but for very few 	£2.89	20%	■ n/a	Private contracts	28%	 2005 Spanish Strat eg y For Nutrition, Physic al Activity And Prevention Of Obesity covers school food
Sweden	■ Yes	Yes -100%	n/a	85%	■ n/a	 Mainly LAs, some recent growth in private contacts 	18%	 70-minute lunchbreak 143
More countries around the world have focused on food-based standards than alternatives

International Comparison



144 – ^{sjoj}

Nova Scotia is an example of a large-scale initiative to promote healthy eating in schools using a combination of standards, education and health-related campaigns, although hard evidence of its impact is limited

Case Study: Healthy Eating Programme In Nova Scotia

Context

- High childhood obesity rates
- Relatively devolved management of school food
 - Federal food-based guidelines
 - Provinces responsible for specific school nutrition policies
- Belief in the importance of diet beyond school: "Nutrition, health and learning are linked"

Actions

- 2005 mandatory Healthy Eating Strategy in Nova Scotia
 - "The objective is to make healthy food and beverage choice the easy choice in the school setting"
- Food and beverages categorised into 'maximum', 'moderate' or 'minimum nutrition groups and limited or promoted respectively, eg
 - Sugar-sweetened drinks and nutrient poor snacks limited or banned
- Series of campaigns involving Dept of Agriculture, school boards, parents

Results

- Improved diet amongst pupils
 - More vegetables eaten
 - Fewer sugary drinks
- Less clear evidence of improved outcomes
 - Childhood obesity rates slightly up 2003-11
 - % of students meeting recommended fruit and veg intake "fairly consistent"
 - Levels of breakfast consumption similar to 2003

Childhood obesity is a persistent problem in many countries around the world

Level of Childhood Obesity International Benchmarks % of boys



dix slides

Examples of strategies that achieve high take-up and relatively low obesity often involve direct intervention from the government and / or substantial commitment from other groups

International Comparisons: Examples Achieving High Take-Up / Relatively Low Obesity

Finland

- Lunch integrated into timetable like other lessons
 - 30 minute lunchtime somewhere between 10.30am and noon
 - Teachers and pupils sit together, pupils learning manners and Finnish customs
- Clear expectations about the physical and social environment for meals
 - Finnish dining rooms are often labelled "The Restaurant" with crockery.
 - From primary level, pupils serve themselves and clear up
- National regulations go well beyond nutritional content
 - Minimum lunch time length
 - Obligation for teachers to guide and supervise pupils at lunch time
 - Lunch must include a main course, salad, drink and bread – there is no choice
 - Packed lunches are banned

Take-Up: 94% Obesity Rate: 19%

Sweden

- Food seen as playing an important role in the school day
 - 70 minute lunchtime
 - Breakfast clubs are encouraged in Sweden
- Dining
 - Canteens with dining rooms in Sweden and Finland
- Significant government investment
 - Universal FSM
 - Provision mostly by LA although increasingly some private contractors involved

Japan

Pupils eat in classrooms with their teachers

- 80% of Japanese schools do not have a dining room
- Lunch seen as an integral part of formal education, promoting social relationships and forming proper eating habits
- Food typically bento boxes, containing tofu stew, rice, vegetables, miso soup, frozen yoghurt and milk
- 50-minute lunch time
- Relatively high degree of engagement with parents
 - Menus are sent home for the coming month containing nutritional information
 - Parents are invited in twice a year to taste the food
- Government part-funds provision (non-food cost part of the meal); financial support also available for opening new lunch programmes or improving existing programmes
- All food prepared on-site with 38% local ingredients (government has pledged future target of 50%)

Take-Up: 80% Obesity Rate: 16%

147

Take-Up: 85% Obesity Rate: 17%

In Scotland, there has been a concerted effort over the last ten years to improve the healthiness of what schoolchildren eat

School Food Policy And Take-Up In Scotland

Policy Context 2003: Hungry For Success review Detailed review of school food quality and provision Recommendations focused on 'whole school, whole child' approach and Established nutrition-based standards and monitoring structure (Health & Nutrition Inspectors) Restrictions on advertising or sale of unhealthy food Encourage teaching about health and cooking with direct links to lunchtime eating

- 2007 School Health Promotion and Nutrition Act
- 2008 Nutritional Requirements For Food and Drink in Scotland Act
- 2010: Curriculum for Excellence
 - "aims to help every learner develop knowledge, skills and attributes for learning, life and work"
 - Health and Wellbeing is one of the 3 core curriculum areas – alongside literacy and numeracy

Take-Up Of School Food In Scotland

% of Pupils Present Taking a Meal (free or paid), 2003-12



1. Eg chips available only twice per week; no crisps for sale; no chocolate or chocolate-coated products; limitations on range of drinks available (no carbonates) Source: Scottish Government Statistics, School Meal Census, OC&C analysis

Structurally, Scotland has a more integrated provision model in which LAs are critical, with greater emphasis on a 'whole school' approach

Scotland's School Food System

- Highly integrated delivery system for school food
 - Scottish Executive has delegated its delivery budgets to the 32 Scottish Local Authorities
 - School meals provided by the LAs under the head of catering (the only exceptions are the few PFI schools)
 - Improved communication
 - Greater buying scale
 - Allows direct visibility of overall nutrients delivered by a caterer (eg calculated from x tonnes of each ingredient used)
 - Fixed meal prices within an LA, lower than in England (typical range £1.40-1.95 Primary, £1.40-£2.25 Secondary)
- More emphasis on 'Whole school' approach:
 - "food in schools is not just about what happens at lunchtime ... promoting consistency across what is taught in the classroom with what is provided in school dining rooms, breakfast clubs, tuckshops, vending machines and after-school clubs is required" – Hungry for Success

Food provided beyond lunch

- Breakfast clubs operated in 36% of schools (more in highly-deprived areas)
- Free fresh fruit for all P1 and P2 pupils (by 2010, 48% of schools reported some extension of the policy, either greater frequency or older pupils)

149

Various initiatives have been tried in different Scottish LAs – with mixed success in Glasgow

Example Initiatives In Scotland



Take-Up Of School Food In Glasgow City LA % of Pupils Present Taking a Meal (free or paid), 2003-12



Various initiatives have been tried in different Scottish LAs – with take-up and wider social benefits in East Ayrshire

Example Initiatives In Scotland



Take-Up Of School Food In East Ayrshire LA

% of Pupils Present Taking a Meal (free or paid), 2003-12



Various initiatives have been tried in different Scottish LAs – South Lanarkshire has adopted a highly cost-efficient approach to achieve excellent growth in take-up

Example Initiatives In Scotland



Take-Up Of School Food In South Lanarkshire LA

% of Pupils Present Taking a Meal (free or paid), 2003-12



Take-up rates still vary significantly by region







Since 2003, efforts to improve school food have been supported by a small group of Inspectors

Scottish Health and Nutrition Inspectors

- Health and Nutrition Inspectors (HNIs) role created 2003 to support the Health Promotion and Nutrition Act
 - 3 full-time Inspectors
 - Part of the larger (50-60 FTE) Education Scotland inspection team
- Activities
 - Inspect a statistically representative sample of the schools Education Scotland visits
 - Full inspection lasts 3 ½ days in Secondary and 2 ½ days in Primary
 - Review the caterer's nutritional analysis of the menu
 - Checking that against the food being served in the canteen
 - Observe the school's implementation of Health and Wellbeing in the classroom
 - NB HNIs rarely go into the school kitchen
- Attitude
 - Deliberately collaborative / supportive shown by LAs calling them for advice even when an inspection is not imminent
 - If a school were to fall seriously short of the expected level, then the school would be given 4 weeks to put an
 improvement plan in place