



# THE TECHNICAL ADVISING PROFESSIONAL TOOLKIT

A guide for providing support to schools in  
implementing the Smarter Lunchrooms Movement





# THE SMARTER LUNCHROOMS MOVEMENT OF CA

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*This material was funded in part by USDA's Supplemental Nutrition Assistance Program - SNAP, known in California as CalFresh (formerly food stamps). These institutions are equal opportunity providers and employers. CalFresh provides assistance to low-income households and can help buy nutritious foods for better health. For CalFresh information, call 1-877-847-3663.*



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# THE SMARTER LUNCHROOMS MOVEMENT OF CA

## Introduction

Welcome to the Smarter Lunchrooms Movement of California (SLM of CA) community! As a certified Technical Advising Professional (TAP), you play a vital role in improving the health of students and in working with schools to create a healthier environment. Your work makes the difference in creating cafeteria environments where children choose to fuel their bodies with healthy school lunch selections. Your support and assistance can provide the motivation for school food service staff to become part of the Smarter Lunchrooms Movement (SLM) to make changes in the cafeteria and school lunch menu. You can inspire teachers to join the SLM by being a role model for healthy living and by linking nutrition education programs to the cafeteria and food choices.

### PURPOSE OF THE TOOLKIT

The purpose of the Technical Advising Professional Toolkit is to be a valuable resource in your work with schools. The content was developed by experienced TAPs who are eager to share successful strategies. It will provide you with guidance for conducting school cafeteria assessments and observations, completing forms and templates to track progress, and working with key school staff to make positive changes in the school lunch program. In addition, the toolkit will help you with coordinating comprehensive nutrition education and promotion efforts.

### SLM OF CA COLLABORATIVE

The SLM of CA Collaborative was formed in 2013 to strengthen the implementation of the SLM in California. The collaborative partners worked together to develop a delivery model to meet the specific needs of California schools, which included in-depth training and technical advising to schools. The accomplishments of the SLM of CA since 2013, including the development of this toolkit, demonstrate the value of partners working together.





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## Expectations of SLM of CA TAPs

The SLM of CA has identified minimum expectations that ALL certified TAPs must meet each school year. Now that you are certified, you are expected to complete the items below.

**Expectation #1:** Collaborate with a *minimum* of one school each year, to complete the following:

1. Conduct a baseline assessment at the beginning of the year and enter data into the [SLM of CA Self-Assessment Scorecard Reporting Tool](#).
2. Develop an action plan for implementing SLM strategies based on the assessment; create the plan in partnership with food service staff.
3. Train food service staff on SLM once per year.
4. Conduct a second assessment after the SLM strategies have been implemented and enter data into the [SLM of CA Self-Assessment Scorecard Reporting Tool](#).

**Expectation #2:** Participate in continuing education opportunities at least two times per year, including any of the following:

1. Communities of practice
2. SLM webinars, including SLM of CA and SLM National Office webinars
3. In-person trainings



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## The SLM of CA Five Step TAP Process

### 1. Engage

- Establish relationships with key stakeholders
- Engage stakeholders
- Explain the SLM TAP process
- Schedule the lunchroom observation
- Prepare for the observation

### 2. Spot

- Observe the lunchroom
- Identify strength and opportunities
- Collect additional sources of data (optional)

### 3. Plan

- Review the SLM scorecard with school nutrition staff
- Identify SLM strategies to implement and create an action plan
- Enter your SLM scorecard data into the SLM of CA Self-Assessment Online Reporting Tool

### 4. Do

- Provide technical advising to school nutrition staff
- Ensure the process is moving forward

### 5. Prove

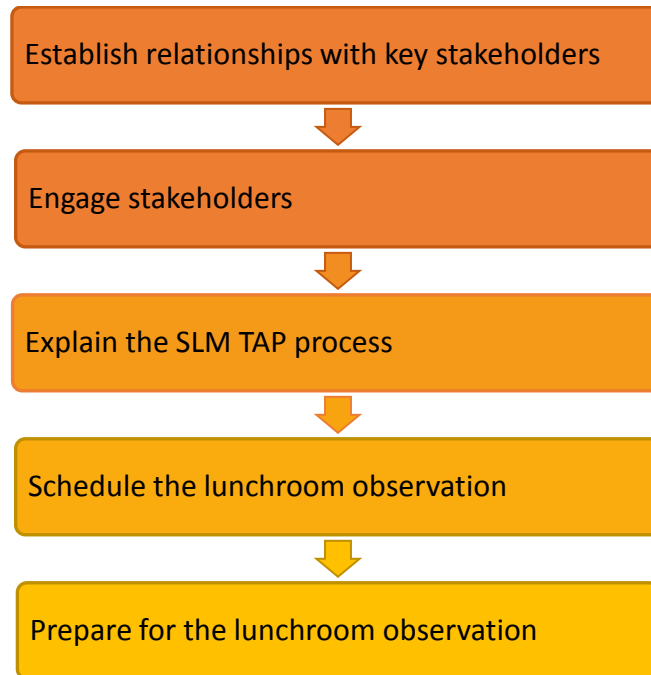
- Repeat Step 2: Spot
- Identify changes made to the lunchroom
- Share your success!



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## Step 1: Engage

Before implementing SLM strategies, it is essential to engage key stakeholders. The relationships you establish during this step will help ensure SLM is implemented successfully, and that your partners are well-equipped to make long-lasting changes to their lunchrooms. Engaging stakeholders requires the following actions:



### Resources Needed:

- The Smarter Lunchrooms Movement Flyer (Pages 13-14)
- Explaining the Site Visit Process Flowchart (Page 15)
- Cafeteria Observation Logistics Form (Pages 17-18)

### ESTABLISH RELATIONSHIPS WITH KEY STAKEHOLDERS

#### Complete the SLM of CA Online Training Module Step 1: Engage

Prior to beginning the engagement process, ensure you complete the online training module created by the SLM of CA that walks you through Step 1: Engage. [You can find the online training module here](#). If you have already completed the module, move on to the next section: Identify Stakeholders.



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## Identify Stakeholders

SLM is a team effort, and getting a diverse group of stakeholders involved in SLM can help establish long-term sustainability. Some stakeholders to consider include:

- School nutrition director
- School administrator
- Lunchroom staff member
- Teacher or other school staff member
- Parent (or PTA member)
- Student (student council member)

## ENGAGE STAKEHOLDERS

Getting stakeholders to believe in SLM and commit to the project is essential to ensuring the sustainability of SLM work. Talk to stakeholders about their goals for the lunchroom and help them understand how the SLM is individualized for each school. Get stakeholders' ideas for improving the cafeteria and help them see how their commitment will contribute to the success of the SLM process.

Utilize **The Smarter Lunchrooms Movement Flyer** to highlight the benefits of SLM. Consider using these key talking points to engage your stakeholders:

- SLM offers simple low- and no-cost changes that can increase consumption and reduce waste in your school cafeteria.
- I know you are already doing great work in your lunchroom. SLM offers additional simple strategies you can consider to reach your goals.
- As a TAP, it is my role to support you in reaching your lunchroom goals using SLM strategies.
- Based on what you now know about SLM, what are some of the goals you hope we can accomplish together?

## EXPLAIN THE SLM TAP PROCESS

For many stakeholders, SLM will be a brand-new concept. Explain that your role as a TAP is to guide and facilitate the SLM process, but that all action taken and changes made in the cafeteria will be completed by stakeholders. Utilize the **Explaining the Site Visit Process Flowchart** as a guide for explaining the site visit process to your key stakeholders. This will help them gain a better understanding of what to expect when you return to their school to observe the lunchroom.



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Give stakeholders the opportunity to be involved in the SLM process at the appropriate level. Cafeteria managers and food service directors should be responsible for most of the SLM action items and should be involved in the entire SLM process. Other stakeholders like principals may just want to be notified when changes are made in the cafeteria, or give input before decisions are made final. Determine what is appropriate for each stakeholder and offer opportunities to be involved.

### SCHEDULE THE LUNCHROOM OBSERVATION

Factors to Consider:

1. Work with your cafeteria manager to schedule a date for the lunchroom observation.
2. Try to observe a “normal” lunchtime. Try to avoid planning your observation on a Monday or Friday or on a minimum day.
3. Make it clear that you are scheduling this observation to find ways to support the cafeteria – your only goal is to help.

### PREPARE FOR THE LUNCHROOM OBSERVATION

1. If you are planning to take pictures of the lunchroom, get permission from the school to take photos. If you plan to take photos of students, you must have a photo release for all students.
2. A day or two before the scheduled observation, confirm the date and time of the lunchroom observation with your school nutrition services contact.
3. Review the scorecard and familiarize yourself with each of the items.
4. Complete the **Cafeteria Observation Logistics Form** to make sure you have all of the logistical information you need to prepare for a successful observation.
5. Refer to Step 2: Spot to prepare and plan for your observation.



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# THE SMARTER LUNCHROOMS MOVEMENT



## NUDGING KIDS TO EAT HEALTHIER

Smarter Lunchrooms is a nationwide movement based on proven strategies for nudging students to select and eat the healthiest foods in the school lunchroom. To date, nearly 30,000 elementary, middle and high schools have successfully used Smarter Lunchroom strategies. Smarter Lunchrooms is dedicated to providing schools with the knowledge, motivation, and resources needed to build a lunchroom environment that makes *the healthy choice the easy choice*.

### The Smarter Lunchrooms Movement...

- Is easy and inexpensive to implement
- Grows school meals participation
- Increases student satisfaction
- Uses simple evidence-based strategies to gently nudge students to make healthy choices
- Empowers, energizes, and engages school nutrition staff
- Increases the amount of healthy food students eat and reduces waste



### 5 Easy Smarter Lunchroom Changes

- Offer sliced or cut fruit
- Offer fruits and vegetables in all service lines
- Keep milk coolers full throughout meal service
- Offer at least 2 types of fruit and 2 types of vegetables
- Offer pre-packaged salads or a salad bar to all students



**IT'S NOT NUTRITION UNTIL IT'S EATEN!**

11/7/2018



# THE SMARTER LUNCHROOMS MOVEMENT - IT WORKS!



↑40%

Offering vegetables in two locations can result in students taking up to **40%** more



↑54%

Holding recess before lunch can increase vegetable and fruit consumption by **54%**



↑100%

Moving fruit from a stainless steel tray to a colorful fruit bowl can **double** sales



↑30%

Giving healthy food choices fun, descriptive names – for example, calling green beans “supercharged green beans” – can increase consumption by over **30%**



↑70%

Offering sliced fruit can increase student consumption by over **70%**



↑70%

Suggesting students take a fruit can increase the number of students eating (not just taking) a fruit by as much as **70%**

“I really appreciate the partnership with the B.E.N. Center and the work Smarter Lunchrooms has done across this country to encourage children to eat healthier meals. What’s really beneficial is that the whole entire initiative has science to back it up.”

**Katie Wilson**  
Deputy Under Secretary  
for Food, Nutrition and Consumer Services

“Strategies like Smarter Lunchrooms give schools simple, actionable, low-cost steps that help make sure that the healthy food on kids’ plates ends up in their stomachs.”

**Tom Vilsack**  
United States Secretary  
of Agriculture

“We started implementing the Smarter Lunchrooms Movement techniques and we saw an increase in our fruit selections by putting those fruits at the point of sale. We’ve also seen an increase in the white milk ... so we are seeing choices made by the students have improved drastically.”

**Melinda Bonner**  
Director of Child Nutrition  
Hoover City Schools

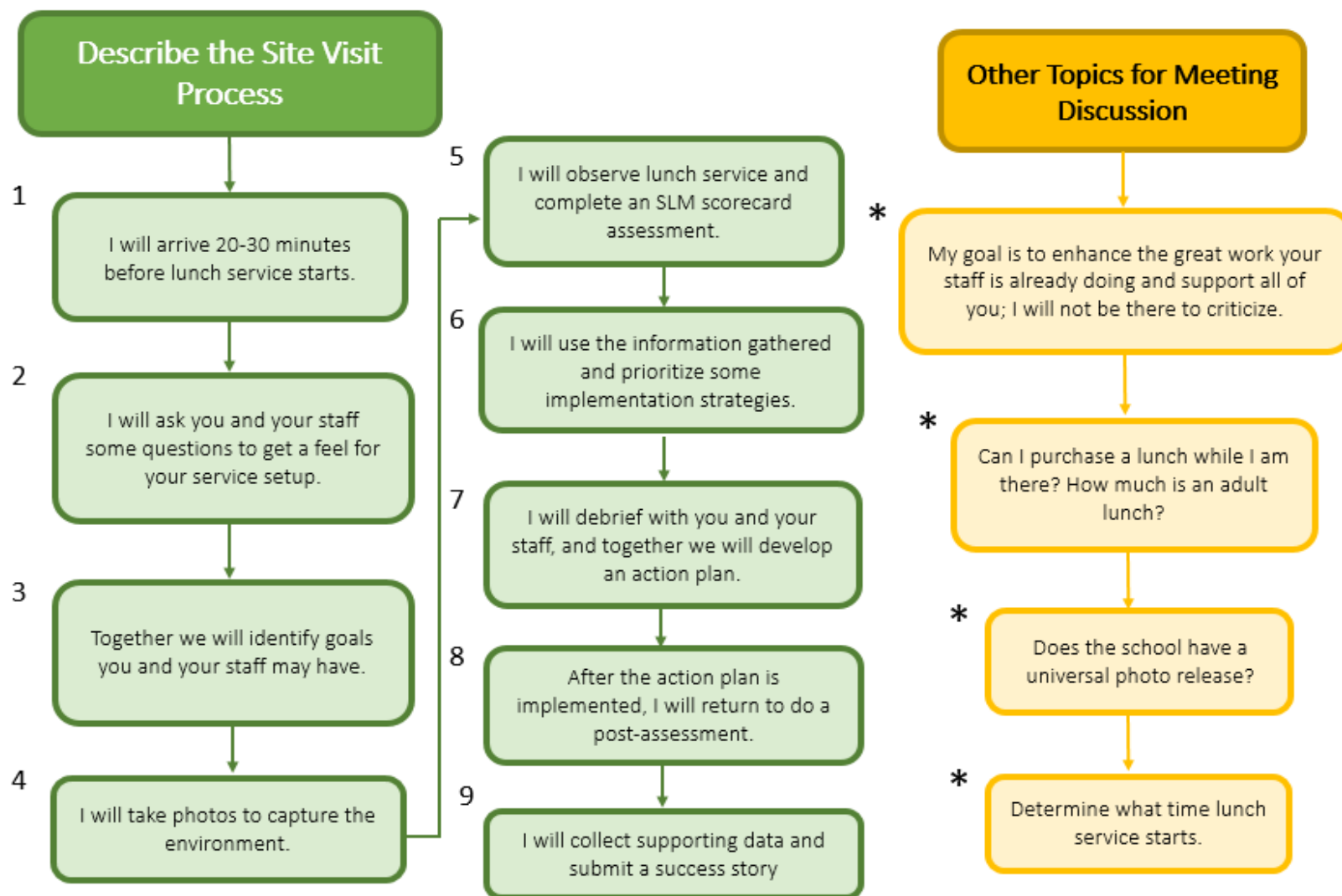


## VISIT SMARTERLUNCHROOMS.ORG TO GET STARTED!



# Explaining the Site Visit Process Flowchart

Utilize this flowchart when you meet with your food service contact before conducting the observation and assessment. The purpose of this chart is to guide you in explaining your role as a TAP and what to expect the day of the site visit.





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# Cafeteria Observation Logistics Form

Complete this form *before* you complete your observation and Smarter Lunchrooms Scorecard. Save this file for your own records. It will help you identify district and school information, key stakeholders and observation logistics.

## District Profile:

District Name:	School Nutrition Services Director (SNSD) Name:
SNSD Email:	SNSD Phone:

## School Profile:

School Name:	School Primary Contact:
Primary Contact Email:	Primary Contact Phone #:
School Free/Reduced Percentage:	Average # of Meals Served per Day:
Meal Times: Lunch Period #1: Lunch Period #2: Lunch Period #3:	Meals Served: <input type="checkbox"/> Breakfast <input type="checkbox"/> Lunch <input type="checkbox"/> Snack <input type="checkbox"/> Supper
School Lunchroom Goals:	Potential Barriers:



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## Observation Logistics:

Date of Observation:	Time of Arrival:
Menu for Observation Day <i>(if available ask for a copy or where to find it online):</i>	

## Debriefing Logistics *(if applicable):*

Debriefing Location:	Debriefing Time:
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## Sample Follow-Up Email:

Hello **CONTACT NAME**,

It was wonderful meeting you and learning more about your lunchroom. I am excited to come to your school to complete an observation and see the great work you are doing. As mentioned at our meeting, I will be visiting your lunchroom on **X DATE** and will arrive at **X TIME**. After completing the observation, I will debrief with you and your staff, and we will identify Smarter Lunchrooms Movement strategies you can implement in your lunchroom. We will also develop an action plan and determine next steps. The debrief meeting will occur **IN/AT X LOCATION** at **X TIME** and will take 15-30 minutes.

If you have any questions about the observation and debriefing process please feel free to contact me. I look forward to seeing you and your staff on **X DATE** at **X TIME**.

Sincerely,

**YOUR NAME/SIGNATURE**

## Step 2: Spot

Before suggesting any changes to the lunchroom, take the time to observe the space and identify potential changes to be made. This step is important because it provides you with an understanding of where the lunchroom stands before any changes are made and helps you to identify existing strengths and opportunities for improvement.

Observe the lunchroom



Identify strengths and opportunities



Collect additional sources of data (optional)

### Resources Needed:

- Clipboard
- Camera or phone to take pictures
- Smarter Lunchrooms Scorecard (Pages 23-24)
- Smarter Lunchrooms Scorecard FAQs (Page 25)
- Photo Checklist (Pages 27-28)
- Smarter Lunchrooms Scorecard Summary (Page 29)
- Action Plan Form (Pages 35-36)

## OBSERVE THE LUNCHROOM

### School Nutrition Staff Introduction to SLM

1. Arrive 30 minutes before the lunch period begins.
2. Go to the school's main office and follow procedures for check-in.
3. Upon entering the lunchroom, introduce yourself to the school nutrition staff and briefly explain why you are there.
  - a. Ensure they know you are not there to audit or judge them. You are simply there to observe and to identify strengths and opportunities for change.



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- b. If school nutrition staff are not too busy, ask them about their goals for the lunchroom. What would they like to focus on? Record the goals you identify on the **Action Plan Form**.
4. Write the date, school name and your name at the top of the scorecard.
5. Begin observing the lunchroom at least 20 minutes before students arrive for lunch. Look at the lunchroom with fresh eyes. Identify the following:
  - a. Entrances and exits
  - b. Service and dining areas, including service setup and flow of the lunch line
  - c. Tray return, trash, recycling
  - d. Lunchroom decor
6. Before the students arrive, identify the path students use to walk through the lunch line. Get a sense of the students' experience of the space.
7. Take photos of the lunchroom setup before the students arrive. Reference the **Photo Checklist** as needed. Remember to take pictures from the same height as the students to capture their visual perspective.
8. Begin checking items off of the scorecard.

### During the Lunch Period

The goal is to complete the scorecard and ask questions that will check off intangibles.

1. Strive to observe at least one lunch period before starting the scorecard.
  - a. This will give you an idea of what to expect during the scoring period.
2. Add a check mark "✓" next to the items on the scorecard that you see during the scoring period.
  - a. The lunchroom receives credit for items taking place during the scoring timeframe (e.g., if fruit is not refilled during the scoring period then it does not count).
3. Circle the items that you do not observe during the observation period.
  - a. This will let you know you have checked for it but did not observe it.
4. Speak with servers, cafeteria monitors and/or custodians to answer questions.
  - a. You will not be able to answer some questions through your observation, like whether students, teachers and/or administrators announce daily meal deals or targeted items in daily announcements.
  - b. Many components of the scorecard are subjective (e.g., "Do the cafeteria monitors have good rapport with students?").
5. Review the scorecard one more time to make sure you have checked off everything you have observed. You may need to check in with other school nutrition staff, teachers or



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administration to confirm if all statements on the scorecard appropriately reflect the school.

- 6. Tally the check marks and write the total score on the back of the scorecard.

## IDENTIFY STRENGTHS AND OPPORTUNITIES

### Complete the Smarter Lunchrooms Scorecard Summary

After completing the scorecard, take some time to review the results and identify the strengths and opportunities for improvement that you discovered during the observation. Complete the **Smarter Lunchrooms Scorecard Summary** to capture your observations so that you have something clear to present to the school nutrition staff during Step 3: Plan.

## COLLECT ADDITIONAL SOURCES OF DATA

While the primary data collection tool for SLM is the scorecard, you can examine other sources of data to identify changes in the lunchroom. As with the scorecard, if you are collecting additional sources of data, gather the data before *and* after any SLM interventions. **Collecting additional data is optional**, but if you are interested, the following data sources can be of use:

Data Source	How to Collect It	What it Can Tell You
Production records	Ask school nutrition staff to share their records	The total servings prepared and served to students by item
Participation data	Ask school nutrition staff to share their records	The number of students participating in the school lunch program daily
Plate waste data*	Collect on your own, with permission from the school	The amount of food wasted by item

\* For more information on collecting plate waste data, [click here](#).



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# SMARTER LUNCHROOMS SCORECARD

Date \_\_\_\_\_ School Name \_\_\_\_\_ Completed by \_\_\_\_\_

The Smarter Lunchrooms Scorecard is a list of simple, no-cost or low-cost strategies that can increase participation, reduce food waste, and increase selection and consumption of healthy school food.

## INSTRUCTIONS

1. Review the scorecard before beginning.
2. Observe a lunch period. Check off statements that reflect the lunchroom.
3. Ask other school nutrition staff, teachers, or administration about items that have an asterisk.\*



4. Tally the score.
5. Discuss the results with stakeholders. Choose unchecked strategies to implement in the lunchroom.

[SmarterLunchrooms.org](http://SmarterLunchrooms.org)

## FOCUS ON FRUIT

- At *least* two kinds of fruit are offered.
- Sliced or cut fruit is offered.
- A variety of mixed whole fruits are displayed in attractive bowls or baskets (instead of stainless steel pans).
- Fruit is offered in at least two locations on all service lines, one of which is right before each point of sale.

- At *least* one fruit is identified as the featured fruit-of-the-day and is labeled with a creative, descriptive name at the point of selection.
- A fruit taste test is offered at least once a year.\*

Focus on Fruit Subtotal \_\_\_\_\_ of 6

## VARY THE VEGETABLES

- At *least* two kinds of vegetables are offered.
- Vegetables are offered on *all* service lines.
- Both hot *and* cold vegetables are offered.
- When cut, raw vegetables are offered, they are paired with a low-fat dip such as ranch, hummus, or salsa.\*
- A serving of vegetables is incorporated into an entrée item at *least* once a month (e.g., beef and broccoli bowl, spaghetti, black bean burrito).\*



- Self-serve spices and seasonings are available for students to add flavor to vegetables.
- At *least* one vegetable is identified as the featured vegetable-of-the-day and is labeled with a creative, descriptive name at the point of selection.
- A vegetable taste test is offered at *least* once a year.\*

Vary the Vegetables Subtotal \_\_\_\_\_ of 8

## HIGHLIGHT THE SALAD

- Pre-packaged salads or a salad bar is available to all students.
- Pre-packaged salads or a salad bar is in a high traffic area.
- Self-serve salad bar tongs, scoops, and containers are larger for vegetables and smaller for croutons, dressing, and other non-produce items.

- Pre-packaged salads or salad bar choices are labeled with creative, descriptive names and displayed next to each choice.

Highlight the Salad Subtotal \_\_\_\_\_ of 4

## MOVE MORE WHITE MILK

- Milk cases/coolers are kept full throughout meal service.
- White milk is offered in *all* beverage coolers.
- White milk is organized and represents at least 1/3 of all milk in *each* designated milk cooler.
- White milk is displayed in front of other beverages in *all* coolers.



- 1% or non-fat white milk is identified as the featured milk and is labeled with a creative, descriptive name.

Move More White Milk Subtotal \_\_\_\_\_ of 5

## BOOST REIMBURSABLE MEALS

- Cafeteria staff politely prompt students who do not have a full reimbursable meal to select a fruit or vegetable.
- One entrée is identified as the featured entrée-of-the-day, is labeled with a creative name next to the point of selection, *and* is the first entrée offered.
- Creative, descriptive names are used for featured items on the monthly menu.
- One reimbursable meal is identified as the featured combo meal *and* is labeled with a creative name.
- The combo meal of the day or featured entrée-of-the-day is displayed on a sample tray or photograph.

- A (reimbursable) combo meal is offered as a grab-and-go meal.
- Signs show students how to make a reimbursable meal on *any* service line (e.g., a sign that says "Add a milk, fruit and carrots to your pizza for the Power Pizza Meal Deal!")
- Students can pre-order lunch in the morning or day before.\*
- Students must use cash to purchase à la carte snack items if available.
- Students have to ask a food service worker to select à la carte snack items if available.\*
- Students are offered a taste test of a new entrée at least once a year.\*

Reimbursable Meals Subtotal \_\_\_\_\_ of 11

## LUNCHROOM ATMOSPHERE

- Cafeteria staff smile and greet students upon entering the service line and throughout meal service.
- Attractive, healthful food posters are displayed in dining and service areas.
- A menu board with today's featured meal options with creative names is readable from 5 feet away when approaching the service area.
- The lunchroom is branded and decorated in a way that reflects the student body.
- Cleaning supplies or broken/unused equipment are not visible during meal service.

- All lights in the dining and meal service areas work and are turned on.
- Compost/recycling and trash cans are at least 5 feet away from dining students.
- There is a clear traffic pattern. Signs, floor decals, or rope lines are used when appropriate.
- Trash cans are emptied when full.
- A menu board with *tomorrow's* featured meal with creative names is readable from 5 feet away in the service or dining area.

Lunchroom Atmosphere Subtotal \_\_\_\_\_ of 10

## STUDENT INVOLVEMENT

- Student artwork is displayed in the service area or dining space.
- Students, teachers, or administrators announce today's menu in daily announcements.\*
- Students are involved in the development of creative and descriptive names for menu items.\*
- Students have the opportunity to volunteer in the lunchroom.

- Students are involved in the creation of artwork or marketing materials to promote menu items.\*
- Students provide feedback (informal - "raise your hand if you like..." or formal - focus groups, surveys) to inform menu development.\*

Student Involvement Subtotal \_\_\_\_\_ of 6

## SCHOOL COMMUNITY INVOLVEMENT

- A monthly menu is posted in the main office.
- A menu board with creative, descriptive names for today's featured meal options is located in the main office.
- A monthly menu is provided to students, families, teachers, and administrators.\*
- Information about the benefits of school meals is provided to teachers and administration at least annually.\*
- Nutrition education is incorporated into the school day.\*
- Students are engaged in growing food (for example, gardening, seed planting, farm tours, etc.).\*

- Elementary schools provide recess before lunch.\*
- The school participates in other food promotion programs such as: Farm to School, Chefs Move to Schools, Fuel Up to Play 60, Share our Strength, etc.\*
- The school has applied for the HealthierUS School Challenge.\*
- Smarter Lunchrooms strategies are included in the Local School Wellness Policy.\*

School Involvement Subtotal \_\_\_\_\_ of 10

## SMARTER LUNCHROOMS SCORECARD TOTAL

Focus on Fruit _____	of 6
Vary the Vegetables _____	of 8
Highlight the Salad _____	of 4
Move More White Milk _____	of 5
Reimbursable Meals _____	of 11
Lunchroom Atmosphere _____	of 10
Student Involvement _____	of 6
School Involvement _____	of 10

Scorecard Total \_\_\_\_\_ of 60

## AWARD LEVEL



### Bronze 15-25

Great job! This lunchroom is off to a strong start.



### Silver 26-45

Excellent. Think of all the kids that are inspired to eat healthier!



### Gold 46-60

This lunchroom is making the most of the Smarter Lunchroom Movement. Keep reaching for the top!

For Scorecard FAQs visit:  
[SmarterLunchrooms.org](http://SmarterLunchrooms.org)

The asterisk \* indicates items that may need input from other school nutrition staff, teachers, or administration.

Smarter Lunchrooms Scorecard 2.0

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Funded in part by USDA FNS/ERS



## DEFINITIONS

**Point of Sale (POS):** Anywhere students leave the line with food and are charged or counted, such as at a register, check-out, or PIN pad

**Point of Selection:** Anywhere students select food or drink

**Service Line:** A designated line for meal selection—deli bar, salad bar, hot lunch line, snack window, etc.

**Grab-and-Go:** A pre-packaged reimbursable meal

**Reimbursable Meal/Combo Meal:** Any meal that meets all the USDA meal requirements and is priced as a unit

**Featured Items:** A fruit, vegetable, milk, or entrée that has been identified for promotion



# SMARTER LUNCHROOMS SCORECARD FAQs

## WHY SHOULD I USE THE SCORECARD?

It offers research-based strategies that can increase participation in school meal programs, reduce food waste, and increase consumption of healthy foods. It provides a snapshot of how many strategies are currently in place in a lunchroom and which ones the lunchroom can work toward. The Scorecard can be filled out repeatedly to measure improvement over time.

## WHO SHOULD COMPLETE THE SCORECARD?

The Scorecard is a valuable tool for school nutrition professionals to use in their own lunchroom(s). School nutrition professionals are encouraged to welcome stakeholders such as students, administrators, PTO members, and outside professionals to complete a Scorecard to give diverse perspectives. Always ask permission before completing a scorecard in a lunchroom that is not your own and always provide results and feedback to the lunchroom leaders afterwards.

## HOW CAN I MAKE THE SCORECARD WORK FOR MY SCHOOL?

Each school is unique and may not be able to implement all the items on the Scorecard – that's OK! Mark off items that currently reflect the lunchroom and use the Scorecard as a list of items to consider for the future.

## WHAT IF A STRATEGY IS ONLY HALF TRUE FOR THE SCHOOL?

Only mark an item if it is completely true for the school. Consider partially true strategies to be prime candidates to implement first!

## IS THE SCHOOL NUTRITION STAFF RESPONSIBLE FOR IMPLEMENTING ALL OF THE STRATEGIES ON THE SCORECARD?

The Smarter Lunchrooms Movement was designed to include support from students, administrators, and the wider school community. These stakeholders can assist with some strategies, especially those in the Student Involvement and School Community Involvement sections.

## THE SCORECARD ITEMS WITH ASTERISKS \* ARE NOT OBSERVABLE. HOW DO I KNOW IF I SHOULD CHECK IT OFF OR NOT?

Check in with the school nutrition director, teachers, or administrators for input on items that are not easily visible.

## HOW LONG SHOULD I OBSERVE WHEN COMPLETING THE SCORECARD?

Arrive 20 minutes before the first meal service begins and plan to stay for at least one entire lunch period. The best practice is to stay for at least two lunch periods.

## MY SCHOOL DOESN'T HOLD RECESS. HOW WILL THAT AFFECT MY SCORECARD TOTAL?

Recess before lunch results in kids eating more fruits and vegetables! However, many middle and high schools don't have recess. If your school doesn't hold recess, do not check off this box. It will not prevent the school from achieving the gold award level.

## WHAT IF ONLY HALF OF THE STUDENTS GO TO RECESS BEFORE LUNCH AND THE OTHER HALF GO AFTER?

Only check off a strategy if it is completely true for all students. If only half the students get recess before lunch, do not check off the strategy.

## WHAT IS AN EXAMPLE OF A GRAB-AND-GO MEAL?

A grab-and-go meal at an elementary school might consist of a turkey sandwich, apple, carrots and ranch, and milk. A grab-and-go meal at a middle or high school might include a grilled chicken salad with whole grain crackers, an orange, and milk. The grab-and-go meal should be pre-packaged for quick service and, ideally, be branded with a creative name and/or image. These meals may be served from a special line, window or cart for added speed and convenience.



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## Photo Checklist

*This is a suggested list of photos for your own organizational purpose.*

For your initial school lunchroom observation, try to aim for 20–30 clear and effective photos. For the final school lunchroom observation of the school year, aim for a few clear and impactful pictures that fully illustrate the changes that have been made after SLM implementation. This process will support visual evidence of your work to stakeholders.

### GUIDELINES

1. For legal reasons, avoid photographing students or collect signed consent forms first. Ask before photographing adults.
  - a. You can check with school administration for permission.
  - b. A photo of the lunchroom with only the back of students' heads is acceptable.
2. Try to take the same shots each time in order to get the clearest before/after comparison.
3. Take photographs when food is on the line.
4. Take photos from students' eye level, especially in elementary schools.
5. Store photographs in a safe location. Back them up.
  - a. When saving photos on your computer, title them with the name of the object and date.
    - i. Example of a title for the initial observation: "Fruit8.11.2015"
    - ii. Example of a title for the final observation: "Fruit Change 5.21.2016"

### Exterior/Approach to Lunchroom and Common Spaces

- Overall view of area, "first glance"
- Doorways
- Wall space and bulletin boards
- Lighting
- Stations or tables in common space (lost and found)
- Traffic flow patterns (entering, lining up and exiting)
- Where cleaning items such as mops, buckets and cloths are stored
- Garbage, recycling and composting



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## Serving Line: Complete for each serving line

- Overall view of area, "first glance"
- Counters
- Walls (especially where students line up)
- Any decorations or signs, including posted menus and promotions
- Hot food serving area
- Cold food serving area
- Snacks/chips/cookies area
- Cooler, open and shut
- Freezer, open and shut
- Milk serving area
- Condiments
- Any other food or beverage serving area
- Register (alone and with surrounding counter and walls)
- Tray storage
- Cutlery storage

## Snack Window

- Overall view of area
- Walls (especially where students line up)
- Any decorations or signs, including posted menus and promotions
- Any food or beverages visible to students
- Register and surrounding view
- Condiments
- Tray storage
- Cutlery storage

## Dining Area: Can be done before or after a lunch period to avoid photographing students

- Overall view of area, "first glance"
- Tabletops
- Seats
- Wall spaces, used or unused
- Signs
- Garbage areas
- Cutlery storage

## Staff Areas

- Wall space, used or unused
- Work stations



# SMARTER LUNCHROOMS SCORECARD SUMMARY

Date \_\_\_\_\_ School Name \_\_\_\_\_ Completed by \_\_\_\_\_

## FIRST IMPRESSIONS

When I walk into this lunchroom, the first thing I notice is...



## STRENGTHS

This lunchroom is doing a really good job at...



## OPPORTUNITIES

This lunchroom could be an even Smarter Lunchroom by...



## NEXT STEPS



**SMARTER LUNCHROOMS  
SCORECARD TOTAL** \_\_\_\_\_ of 60

**AWARD LEVEL** \_\_\_\_\_  
Bronze 15-25 Silver 26-45 Gold 46-60

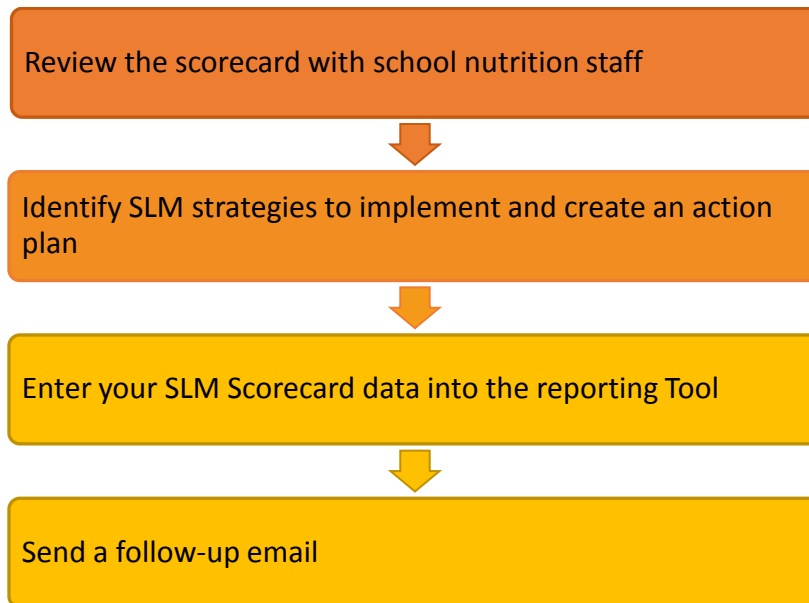


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## Step 3: Plan

After you have completed the lunchroom observation and identified strengths and areas of opportunity, it is time to sit down with the school nutrition staff to develop a plan for implementing changes. During this step, you will explain what you discovered, and you will work together to develop an action plan. Here are the actions you will take to complete Step 3 of the SLM process:



**Approximate Time to Complete:** 15-30 minutes

**Resources Needed:**

- Completed scorecard
- Completed Smarter Lunchrooms Scorecard Summary
- Photos of the lunchroom
- Action Plan Form (Page 35)
- [SLM of CA Self-Assessment Scorecard Online Reporting Tool](#)

### REVIEW THE SLM SCORECARD WITH SCHOOL NUTRITION STAFF

After completing the Smarter Lunchrooms Scorecard, take some time to sit down with school nutrition staff to discuss your findings. Utilize the Smarter Lunchrooms Scorecard Summary sheet you completed during the observation as a guide for this discussion. Utilize the photos you



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took during your observation to demonstrate the successes and opportunities you discovered. Here are the steps to take to successfully review the scorecard with school nutrition staff:

1. Discuss the strengths of the lunchroom. Offer praise to the staff for their important work, and remind them that you are here to help build upon their current successes.
2. Discuss areas of opportunity and strategies that could be implemented. Keep the list of potential changes short. You do not want to overwhelm the staff by discussing every possible change they can make. Ensure that the changes you discuss align with the goals and interests of the school nutrition staff.

**TIP:** When reviewing your scorecard findings with staff, de-emphasize the score. The baseline score is not important, and often people focus on their score rather than their successes and opportunities. The intent of the scorecard is not to get a 60/60, but rather to make incremental improvements over time.

### IDENTIFY SLM STRATEGIES TO IMPLEMENT AND CREATE AN ACTION PLAN

Once you have discussed the strengths and opportunities of the lunchroom, work with staff to identify three to five SLM strategies they can implement. During this step, complete the **Action Plan Form** with staff to ensure it is clear who is responsible for each of the tasks and to identify a clear timeline for implementation. When developing the action plan, ensure you include a timeline for implementation. Include an estimated time for when you will return to the school to conduct a follow-up assessment. It is important to note that you should *wait a minimum of 10 weeks after changes are implemented to complete your next assessment.*

### ENTER YOUR SLM SCORECARD DATA INTO THE ONLINE PORTAL

1. Go to the [SLM of CA Self-Assessment Scorecard Online Reporting Tool](#)
2. Follow the instructions in the portal to enter your data.
3. Once you have submitted your data, you will receive a confirmation email with a link to the data you entered. Click on the link and save a PDF copy of the data to your records.
4. Scan and save the original scorecard to your records.

### SEND A FOLLOW-UP EMAIL

After you meet with school food service staff to discuss your findings and make an action plan, send a follow-up email to your contact. Include a copy of the action plan. Below is a sample email:



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Hello *CONTACT NAME*,

It was wonderful observing your lunchroom and meeting with you on *X DATE*. I appreciate you taking the time to meet with me and develop an action plan for SLM implementation. I am attaching a copy of the action plan for your review. *INCLUDE ANY RESOURCES YOU OFFERED TO PROVIDE DURING THE PLANNING PROCESS.*

Please remember, I am here to support you in accomplishing your lunchroom goals and will provide ongoing technical assistance to ensure you successfully implement your SLM action plan. If you have any questions or need additional support, please contact me.

For your information, I plan to return to your lunchroom approximately 10 weeks after you implement the action plan to complete another scorecard and identify any changes you have made to the lunchroom.

Sincerely,

*YOUR NAME/SIGNATURE*



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# Action Plan Form

Use this form to summarize your SLM goals and the results of your Smarter Lunchrooms Scorecard. Then create an action plan and develop a task list for next steps in SLM implementation.

## General Information

School Name:	District Name:
TAP Name:	Date of Observation:
School Nutrition Staff Name(s):	School Nutrition Services Director Name:

## Lunchroom Successes

## Overall Goals for this Lunchroom

Goal 1	
Goal 2	
Goal 3	



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## SLM Self-Assessment Scorecard Results

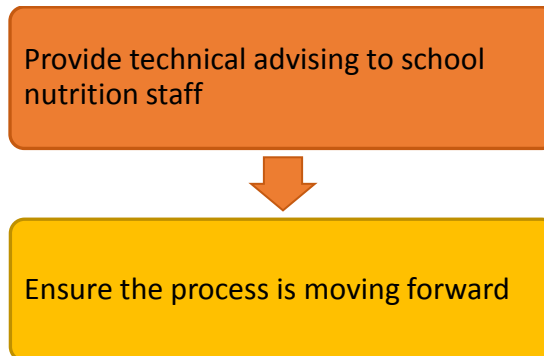
Category	Score	Possible Score
Focus on Fruit		6
Vary the Vegetables		8
Highlight the Salad		4
Move More White Milk		5
Boost Reimbursable Meals		11
Lunchroom Atmosphere		10
Student Involvement		6
School Community Involvement		10
<b>TOTAL SCORE</b>		<b>60</b>

## Action Plan

SLM Strategy	Task(s)	Person Responsible	Complete By (date)

## Step 4: Do

Now that you have developed a strong action plan, it is your role to support school nutrition staff in implementing it. Remember, you are not implementing their action plan for them. You are providing guidance, training and resources to ensure they are successful in their SLM work. To successfully complete Step 4, follow these simple actions:



### Resources Needed:

- Completed Action Plan Form
- No Time to Train resources
- SLM implementation resources

## PROVIDE TECHNICAL ADVISING TO SCHOOL NUTRITION STAFF

Based on the action plan you developed with the school nutrition staff, work with them to identify their needs to successfully implement the SLM strategies they selected. If needed, provide training to school nutrition staff to ensure they are well-equipped to implement the strategies. Utilize the [No Time to Train resources](#) to provide short trainings for frontline staff.

Offer free SLM resources to support staff in the implementation of the action plan. Here are links to some helpful resources:

- [Creative, Fun, and Descriptive Names](#)
- [Printable signage](#)
- [Flavor Station resources](#)
- [SLM of CA resources](#)



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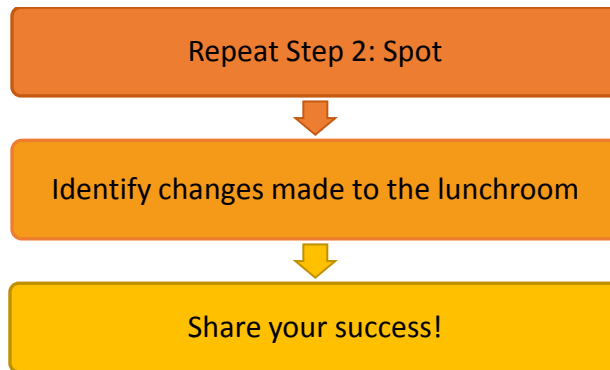
### ENSURE THE PROCESS IS MOVING FORWARD

After providing staff with the training and resources necessary to implement their action plan, make a point to check in with them regularly to assess progress and identify additional areas where you can provide support. This is an important step in the SLM process because it reminds school nutrition staff that they are not alone in their SLM implementation.



## Step 5: Prove

After you have supported the school nutrition staff in the implementation of their action plan, return to the school to complete another Smarter Lunchrooms Scorecard and identify the changes that were made to the lunchroom.



### Resources Needed:

- Clipboard
- Camera or phone to take pictures
- Smarter Lunchrooms Scorecard (Pages 23-24)
- Smarter Lunchrooms Scorecard FAQs (Page 25)
- Photo Checklist (Pages 27-28)
- Smarter Lunchrooms Scorecard Summary (Page 29)
- Action Plan Form (Pages 35-36)
- Success Story Form (Page 41)
- [SLM of CA Self-Assessment Scorecard Online Reporting Tool](#)

### REPEAT STEP 2: SPOT AND IDENTIFY CHANGES MADE TO THE LUNCHROOM

During this part of the SLM process, you will complete the same actions you took during Step 2: Spot. Refer back to **Step 2** for guidance on completing your lunchroom observation.

### IDENTIFY CHANGES MADE TO THE LUNCHROOM

Once you have completed your second scorecard, identify the changes that were made to the lunchroom. Make sure to take photos of the new SLM strategies that have been implemented.



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Congratulate the school nutrition staff for their hard work and dedication to making their lunchroom smarter. If they are interested in continuing their SLM work, create a new action plan based on the new scorecard.

Continue providing technical advising as the school nutrition staff implement new SLM strategies.

### SHARE YOUR SUCCESS!

After completing your follow-up scorecard and identifying the changes made to the lunchroom, make sure to share your success with the SLM of CA and your partners. Now is the time to celebrate the hard work that went into SLM implementation. Taking the time to write a success story is an important step in recognizing the incredible work that was done to improve the health of the students at your school. Utilize the **Success Story Form** to share your success! Once you complete the form, email it to [casmarterlunchrooms@gmail.com](mailto:casmarterlunchrooms@gmail.com), and it could be published in the SLM of CA *Nudge* newsletter!

In addition to sharing your success story with the SLM of CA, ensure you share it with your key stakeholders. This will show support for the hard work school nutrition staff put into SLM implementation and encourage them to continue their SLM work. Consider sharing the success story in the school newsletter or on the district website as a highlight.



# Success Story Form

<b>Title of Success Story:</b>	
<b>School/District Profile</b>	
<b>Name of the School or District:</b>	
<b>Grade Levels:</b>	
<b>Enrollment in School Lunch Program:</b>	
<b>Percentage Free and Reduced:</b>	
<b>Average Participation in the School Lunch Program:</b>	
<b>School Nutrition Services Director:</b>	
<b>School Nutrition Staff:</b>	
<b>TAP Information</b>	
<b>TAP Name:</b>	
<b>TAP Organization:</b>	
<b>TAP Email Address:</b>	
<b>SLM Implementation</b>	
<b>SLM Principles Implemented:</b>	<input type="checkbox"/> Focus on Fruit <input type="checkbox"/> Vary the Vegetables <input type="checkbox"/> Highlight the Salad <input type="checkbox"/> Move More White Milk <input type="checkbox"/> Boost Reimbursable Meals <input type="checkbox"/> Lunchroom Atmosphere



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	<input type="checkbox"/> Student Involvement <input type="checkbox"/> School Community Involvement
<b>Description of the Cafeteria Changes:</b>	
<b>Quote From School Nutrition Staff or Student/Teacher/Principal</b>	
<b>Photos</b>	
<b>Before and After Photos:</b>	
DON'T FORGET TO SUBMIT YOUR SUCCESS STORY TO <a href="mailto:casmarterlunchrooms@gmail.com">casmarterlunchrooms@gmail.com</a>	



## Additional Web Resources

[SLM of CA Website](#): Includes California-specific tools, information on training and events, and TAP resources.

[SLM National Office Website](#): Includes national tools and training information.

[SLM of CA Recorded Webinars](#): Offers recorded webinars and webinar slides on pertinent topics like tray waste measurement, resources, success stories, youth engagement and more.

[SLM Language in School Wellness Policies](#): Provides specific language you can add to school wellness policies to support and reinforce SLM work in school cafeterias.

[SLM of CA Online Self-Assessment Scorecard Reporting Tool](#): The SLM of CA data entry tool. Enter all scorecard data into this portal.