Menu Planning for Customer Satisfaction

A MOWAA Specialist Certificate Program Workshop

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Importance of Menu Planning

- **Well-planned menus are essential for a program that successfully serves meals which meet the needs of older persons**

  - **Special needs of older persons must be considered in menu planning, food selection, meal preparation and meal presentation**
  - **Program customers should be involved in the menu planning process**
  - **Customer food preferences must be solicited in the menu development process**

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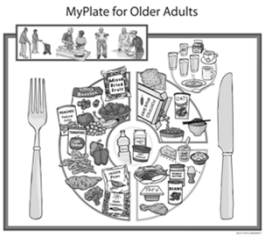
Importance of Menu Planning

- **Menu Planning Impacts All Facets of a Meal Delivery Program**
  - **Customer Satisfaction**
  - **Cost**
  - **Program Facility Requirements**
  - **Equipment Requirement**
  - **Personnel Requirements**



- **Poor menu planning ⟹ poor program success**

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Types of Menus

- **Cycle Menu:**
  A series of menus offering different items each day on a monthly or some other basis, after which the cycle is repeated
- **Choice Menu:**
  A menu which provides options from which customers can choose when selecting their meal

- **A cycle menu may offer choices; a choice menu may be a cycle menu**

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Menu Choices

- Generally, in the past, most meal programs for older persons have not provided menu choice options for their customers
- Menu choice is, and will be, increasingly important for successful meal programs
  - Health care now focuses on self-directed care practices which allow persons to make choices about their care
  - Aging baby boomers, programs' future customers, expect to have choices in their foods and meal practices

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Menu Choices

- Customers might have different types of menu choices, such as:
  - Choosing from alternatives for some of the menu items, such as the entrée or one or more of the side items
  - Choosing a meal from 2 or 3 distinct complete meal options
  - Selecting an alternative meal type (refrigerated, frozen, or shelf-stable meal)
  - Selecting frequency of meal deliveries to their home

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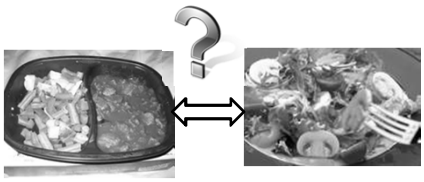
Menu Choices

Programs need to start making adjustments NOW so they will be able to cost- effectively implement choice menus.



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Factors to Consider in Menu Planning

- **Important considerations in menu planning are:**
  - **Customer Satisfaction**
  - **Customers' Nutritional Needs**
  - **Aesthetic Factors**
  - **Government and Other Agency Regulations**
  - **Cost**
  - **Feasibility Within Program Structure**

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Customer Satisfaction

- Know your customers – seek their advice
  - Customer demographics
  - Socio-cultural factors
    - Ethnicity – Values - Mores
  - Regional & local food habits
  - Food preferences
    - How food is prepared
    - Popular foods in your region?

- Consider focus groups, menu committees, product sampling, customer surveys, comment cards, food waste surveys to help you with menu planning
- *If your customers don't like your food and won't eat it, all your program's efforts are wasted!*

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Customer Satisfaction

- Menu adjustments for the future
  - Advent of the baby boomers
    - Want more variety in their food
    - Like varied methods of food preparation
    - Want a voice in determining what they eat
    - Don't always eat "traditional" 3 meals a day
  - Changes in ethnic composition of customers
    - Increased presence of Latinos
    - Customers representative of many ethnic minorities
    - Increased ethnic diversity means more variance in religious food preferences/restrictions
- Need to consider development of choice menus

If your customers don't like your food and won't eat it, all your program's efforts are wasted!

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Customer Satisfaction

- **Need for menu choice reflected in current food trends:**

Customer Driven	**Comfort Foods**
International Foods	**Ethnic Foods**
Tasty, Has Eye Appeal	**Variety**
Healthy	**Nutrient Dense**
Homemade	**Lighter Fare**

If your customers don't like your food and won't eat it, all your program's efforts are wasted!

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Customer Satisfaction

- **Many persons, including older persons – especially the baby boomers, believe:**
  - **Food and nutrition play a role in health & wellness**
  - **Certain foods have benefits beyond basic nutrition. These benefits include:**
    - **Heart, bone, eye, circulatory, & digestive health**
    - **Contribution to healthy body weight**

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Customer Nutritional Needs

- **To achieve your program's goals, the meals served must contribute to the nutritional needs of your customers.**
  - **Two sources used to set standards for older persons' nutritional needs**
    - **DRIs (Dietary Reference Intakes)***
      Dietary Guidelines for Americans 2010**
  - **Consideration of customers' needs for menu modifications and/or special diets**
    - **What menu modifications are needed**
    - **Feasibility of offering menu modifications or special diet menus**
    - **To the extent practical, menus are to be adjusted to meet any special dietary needs of program customers**

Developed by National Academy of Sciences, Institute of Medicine, Food and Nutrition Board.
***** Developed by the USDA and USDHHS***

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Customer Nutritional Needs

Dietary Reference Intakes for Key Nutrients

Gender	Calories (Estimated Energy Requirement)	Protein (g per kg per day)	Calcium (mg per day)	Vitamin A – (mcg per day)	Vitamin C - (mg per day)	Potas-sium - (mg per day)	Fiber – (g per day)	Sodium - (mg per day)
Males age 51-70	2750	0.66	800	625	75	4700	30	1300
Females age 51-70	2200	0.66	1000	500	60	4700	21	1300
Males > age 70	2550	0.66	1000	625	75	4700	30	1200
Females > age 70	2050	0.66	1000	500	60	4700	21	1200

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Customer Nutritional Needs

- Some states have simplified the DRIs for key nutrients to indicate the nutrient levels required when one meal is served.
- Generally the states' tables focus on the nutrients indicated in the previous table. However, there is sometimes a caveat that meeting those requirements does not mean all necessary nutrients are provided in the meal

- Other nutrients which should be considered when planning & evaluating menus include vitamin B6, vitamin B12, vitamin D, vitamin E, magnesium & zinc

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Customer Nutritional Needs

- Sample of states' per meal target nutrient requirements:

State	Kcal	Pro - g	Vit A – ug	Vit C - mg	Ca - mg	Na - mg	K - mg	Fiber - g	Vit D - IU	Vit B12 - ug	Zn - mg
State #1	600 - 750	≥ 20	250 – 300	25 - 30	≥400	800 – 1000	≥ 1500	≥ 7	not listed	not listed	not listed
State #2	> 550 – 700	14	250	25	400	< 800	1565	>7	200 IU	0.8 ug	2.6
State #3	not listed	>21	not listed	≥30	≥400	≤1000	≥1567	≥8	≥2.5 ug (100IU)	not listed	not listed
State #4	685	19	300	30	400	767	1050	9	3.33 ug	0.8 ug	3.7

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Customer Nutritional Needs

Additional recommendations from the Food and Nutrition Board, Institute of Medicine, National Academies include:

- ✓ **Calories should be distributed as follows:**
  - ✓ **45 – 65% from Carbohydrate; 10-35% from protein; 20-35% from fat**
- ✓ **While consuming a nutritionally adequate diet:**
  - ✓ **Dietary cholesterol should be as low as possible**
  - ✓ **Trans fatty acids should be as low as possible**
  - ✓ **Saturated fatty acids should be as low as possible**
  - ✓ **Added sugars should be limited to no more than 25% of total energy (though this level of added sugars is not a recommended amount – no recommended intake of added sugars has been set)**

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Dietary Guidelines 2010

- **Key recommendations include:**
  - **Maintain calorie balance over time to achieve and sustain a healthy weight**
  - **Focus on consuming nutrient-dense foods and beverages**
  - **Foods and nutrients to increase:**
    - **Vegetables and Fruits: Eat a variety of vegetables, especially dark-green and red and orange vegetables, beans, and peas**
    - **Consume at least half of all grains as whole grains: Increase whole-grain intake by replacing refined grains with whole grains**

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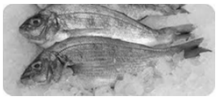
Dietary Guidelines 2010

- Foods and nutrients to increase (con't):
  - Increase intake of fat-free and low-fat milk and milk products
  - Choose a variety of protein foods, including seafood, lean meat and poultry, eggs, beans and peas, soy products, and unsalted nuts and seeds
  - Increase the amount and variety of seafood consumed
  - Use oils to replace solid fats where possible
  - Choose foods that provide more potassium, dietary fiber, calcium, and vitamin D
  - Replace protein foods that are higher in solid fats with choices that are lower in solid fats and calories and/or are sources of oils



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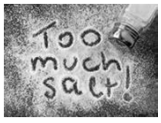
Dietary Guidelines 2010

- Foods and food components to reduce:
  - Reduce daily sodium intake to less than 2,300 mg/day and further reduce intake to 1,500 mg among persons who are 51 and older and those of any age who are African American or have hypertension, diabetes, or chronic kidney disease
  - Reduce the intake of calories from solid fats and added sugars



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Dietary Guidelines 2010

- Foods and food components to reduce, cont.:
  - Limit the consumption of foods that contain refined grains, especially refined grain foods that contain solid fats, added sugars, and sodium
  - If alcohol is consumed, it should be consumed in moderation – up to one drink per day for women and two drinks per day for men
  - Consume less than 300 mg of dietary cholesterol per day
  - Consume less than 10% of calories from saturated fatty acids by replacing them with monounsaturated and polyunsaturated fatty acids

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Customer Nutritional Needs

- Concerns with targeted sodium requirements per meal:
  - Based on the *Dietary Guidelines for Americans 2010*, the sodium allowance per meal = 800 mg
  - Most states allow up to 1000 mg/meal based on a weekly average
  - Some allow a limited number of meals to have 1200 mg provided the meals are labeled as high sodium
  - Higher levels of sodium in meals (1000-1200 mg) should be offset by a high potassium content in that meal
  - Some studies have shown that the elderly nutrition program meal provides 40 – 50% of customers' daily nutrient intake; so higher sodium content in the program meal may represent 40 – 50% of their daily sodium intake, not 33.3%.

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What do these requirements mean for menu planning??

- Working within the parameters of their states' nutrient content guidelines, menu planners should consider innovative ways to incorporate
  - Vegetables, fruits, whole grains, low-fat or fat-free milk, yogurt or fortified soy beverages, seafood, and vegetable oils such as canola, olive, corn, peanut, and soybean

- And find ways to limit foods with added sugars, solid fats – especially trans fats - refined grains, and sodium

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Government Regulations

- Federal government standards provide limited direction:
  - Meals must provide a minimum of 33-1/3% of the Dietary Reference Intakes (DRIs) if the program provides 1 meal per day
  - The minimum increases to 66-2/3% of the DRIs if 2 meals are provided and 100% if 3 meals are provided per day
  - Meals must comply with the most recent Dietary Guidelines for Americans

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State Regulations

- Each state has the responsibility for establishing nutrient standards for meal programs within that state
- Programs within a state must comply with that state's nutritional requirements for meals served to be eligible for government funding support
- Each state is unique in it's nutrient standards and in the requirements relative to programs meeting those standards

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Government Regulations

- The Older Americans Act states that nutrition programs need to have their menus planned or reviewed by a dietitian or other individual with equivalent education and training in nutrition science
  - If such a person is not available, then an individual with comparable expertise in the planning of nutritional services must be similarly involved in a program's menu planning
- This requirement is generally reflected in state regulations

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Menu Evaluation

- States require planned menus to be evaluated to verify that the nutritional requirements have been met.
- Programs are encouraged to analyze the nutrient content of their menus by using a nutrient analysis computer program
- In most states, each day's menu does not necessarily need to meet the nutritional requirements as the requirements can generally be met by averaging the nutritional content of a week's menus
- Calorie and protein requirements per meal may be an exception to averaging in some states. These requirements should be met in each meal.

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Menu Evaluation

- If a program does not have access to computerized nutrient analysis for their menu evaluation, states allow these programs to follow a prescribed menu pattern for their menus.
- This pattern varies from state to state, but generally follows the USDA's *My Pyramid* pattern of food group servings
- Regardless of the evaluation procedure, a registered dietitian or an individual with comparable experience must certify that each meal or the week's meals meets the state's nutrient requirements

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Sample State Meal Patterns

California 1600 Calorie per Day Component Meal Pattern

Food Group	Required Servings for 550 Calories per Meal	Serving Sizes for 1600 Calorie Level
Lean meat or beans	1 serving – 2 ounces per meal	2 ounces = 1 serving
Vegetable	1 – 2 servings	½ cup = 1 serving
Fruit	1 serving	½ cup = 1 serving
Bread or Grain At least ½ whole grain	1-2 servings	1 slice bread = 1 serving; ½ cup of rice or pasta = 1 serving
Low-fat milk or milk alternate	1 serving	1 cup or measured equivalent
Fat	optional	
Dessert	optional – limit sweets; use fruit	Select foods high in fiber and low in fat and sugar

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Menu Evaluation

- **Other possible state requirements include:**
  - **Using standardized recipes for all meal items**
  - **Having programs secure approval for the nutrient analysis program they intend to use**
  - **Keeping documentation of menu reviews and approvals on file**
  - **Having menu substitutions approved by a registered dietitian before service or have substitutions selected from a list approved by a registered dietitian**
  - **Documenting menu substitutions & maintaining documentation of menu substitutions on file**

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Menu Evaluation

- In addition to the required nutrient analysis, some states may conduct additional reviews and recommend improvements such as:
  - Recommendations for ways to avoid added food costs
  - Commentary on the variety of foods and other aesthetic factors
  - Recommendations for the use of seasonal foods or locally grown foods

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Menu Evaluation

- You may satisfy all of the state and federal requirements for planned menus, but you still need to know what your customers think about your menus
- Need to routinely conduct customer menu evaluations
  - Collect and review customer comments
  - Conduct periodic customer satisfaction surveys
  - Evaluate participation rates
  - Collect comments from meal delivery personnel

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MOWAA Accreditation Nutrition Requirements

- **Menus must:**
  - **Comply with the latest DHHS and USDA *Dietary Guidelines for Americans*; and**
  - **Provide a minimum of 25% of the latest Dietary Reference Intakes for calories, protein, calcium, vitamin A, vitamin C, potassium, and fiber with sodium less than 1,200 mg if one meal is provided.**
  - **If 2 meals/day are provided, them the meals must provide 50% of the DRIs and sodium less than 2000 mg;**
  - **If 3meals are provided, then 75% of the DRIs must be provided with sodium less than 2,300 mg.**
  - **Fat content of the meals will average 35% or less of the total calories per meal.**

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Menu Planning Process

- **Effective menu planning follows a planning process**
  - **Entrees for all the lunches in the cycle are planned first**

    - **Consideration should be given to entrée ingredients that are:**
      - **Appropriate for special diet needs**
      - **Usable in multiple menu items and preparation options**
  - **Next plan the starch/grain items for all lunches**
  - **Then plan the side items (vegetables/salads/breads)**
  - **Finally, plan the desserts**
  - **If more than one meal if provided, plan the second meal after all the lunch meals are completed**

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Menu Planning Process

- Two additional considerations when planning menus for meal programs:
  - Substitute menu items which can be used if the planned item is not available or can't be tolerated by the customer may be designated in the planning process
  - When choice menus are planned, the choice options must be nutritionally comparable
- When included in the planning process, both the substitute menu items and choice options should be planned during each step of the planning process, as appropriate

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Menu Planning Process

- When planning allowable food substitutions:
  - Food substitutions should be of similar nutritional value as the original menu item
  - Food substitutions may not reduce or significantly alter the nutritional content of the meal
  - States often limit the number of substitutions allowed during a given time period
  - Generally, menu substitutions must be documented by the program and may need to be reported to the state

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Menu Planning Process

- Since food substitutions often need to be approved prior to service, incorporating allowable food substitutions into the menu planning process can save time and effort when substitutions are needed
- Some states or area agencies have written lists of acceptable food substitutions for the several types of menu items

  - Lists are an alternative to planning menu item substitution options as a part of the menu planning process

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Menu Planning Process

- Example of menu and approved substitutions

Menu Item	Approved Substitution
Turkey Meatballs	Sliced Turkey Breast
Whole Kernel Corn	Any Potato or Rice
Steamed Broccoli	Any Green Vegetable, (spinach, green beans, etc.)
Whole Wheat Roll	Whole Wheat Bread
Pumpkin Cake	Any Fruit or Fruit Cookie or Cake
Milk	Skim or 1% Milk

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Aesthetic Factors

- Well-planned menus consider more than customer nutritional needs
- People "eat" with all their senses
- Effective menu planning is an "art" as the aesthetic factors of the foods planned for each meal must be considered
- Aesthetic factors include
  - Flavor
  - Texture
  - Color
  - Shape
  - Preparation methods

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Aesthetic Factors

- Flavor:
  - Foods of the same or similar flavors generally should not be repeated in a meal
  - A variety of flavors within a meal is more enjoyable than flavor duplications
- Texture:
  - Refers to the structure of foods and is detected by the feel of foods in the mouth
  - Crisp, soft, grainy, smooth, hard, and chewy are texture descriptors
  - Textures should be varied within a meal
  - Texture may need to be modified for some customers' special meal needs

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Aesthetic Factors

- **Color:**
  - **Color has eye appeal and makes the meal more appetizing**
  - **Color combination should always be considered when planning a meal**
- **Shape:**
  - **Shape can be used to create interest in a meal by presenting food in a variety of forms**

- **Preparation Method**
  - **Combinations of foods using different preparation methods add variety and appeal to a meal**
  - **The nutritional needs of older persons should be considered when selecting preparation methods**

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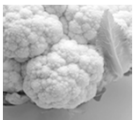
Aesthetic Factors

Compare these menus:

Chicken and Rice Casserole
Steamed Cauliflower
Pear and Cottage Cheese Salad
White Dinner Roll, Butter
Baked Custard



Chicken Tetrazzini
Steamed Broccoli
Coleslaw (carrots, red & green cabbage)
Whole Wheat Bread, Spreadable butter (with olive or canola oil)
Apple & Cranberry Crisp

Which menu would you prefer if you were homebound or maybe not feeling very hungry???

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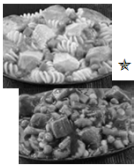
Program Operation Considerations

- Program structure impacts the menu planning process
  - Programs purchasing frozen or refrigerated prepared meals (entrée and side items [starch & vegetables]):
    - Menu planning restricted to meals available from the supplier of the prepared meals
    - Nutritional evaluation of the plated meals the responsibility of the meal supplier
    - Program needs to get meal nutritional content of the plated meals from supplier to incorporate into nutritional evaluation of the total meal (includes plated meal, bread, beverages, and any other items the program distributes with the plated meal)



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Program Operation Considerations

- Program structure impacts the menu planning process
  - Programs contracting with a supplier to prepare meals for them at their site:
    - Menu planning can be done by either qualified program personnel or contractor's dietitian
    - If menu planning done by the contractor, program still needs to have oversight over the menu planning process
      - Qualified program personnel need to review the menus
        - For production feasibility
        - Customer acceptance
        - Cost considerations
      - Program needs to either conduct the nutritional analysis or review the nutritional analysis done by the contractor
      - Program needs to verify that the planned menu is being followed when meals are prepared for customers

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Program Operation Considerations

- Program structure impacts the menu planning process
  - Programs preparing their own meals:
    - Must have a dietitian or other qualified personnel on staff to plan and evaluate their menus
    - Can contract with a dietitian to do the menu planning and/or the required nutritional evaluation
    - Must be sure that they have the production capability to prepare and serve menus that meet both the nutritional requirements and are aesthetically appealing

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Program Operation Considerations

- Many factors should be considered when determining whether programs will purchase prepared meals or prepare their own meals
- These factors also impact the type of meal provided – whether hot, cold, frozen, or shelf stable
- Some factors to consider include:
  - Program facilities and equipment
  - Skills of program staff
  - Number of customers
  - Where customers are located
  - Frequency of meal service
  - Number of meals provided per day
  - Program resources
  - Compliance with state & local health codes

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Program Structure

- **The factors impacting the structure of a meal program and decisions regarding the type of meal to provide to customers and the menu planning process will be discussed in tomorrow's workshop entitled**

  Designing Meal Delivery Systems

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Menu Cost

- **Cost is always a consideration in menu planning**
- **However, just serving the lowest cost meal to program customers may be self-defeating for a program**
- **Cost effective menus balance cost with meal quality, nutritional content, and customer satisfaction**
  - **Low cost meals which customers don't eat mean programs do not meet program goals and/or may soon be "out of business"**

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Menu Cost

- **In general, meal cost will be lowest for meals prepared on-site by the program and highest for meals that are purchased as complete meals with all accompaniments ready for distribution to customers**
- **Factors impacting meal costs include:**
  - **Purchasing practices**
  - **Contract provisions**
  - **Product receiving and storage practices**
  - **Inventory management practices**
  - **Controlling product waste**

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Menu Cost

- **Ways to control menu costs while striving to meet both the DRIs and the *Dietary Guidelines for Americans 2010* as well as offering choice menus:**
  - **Use competitive bidding when contracting for meals or purchasing program foods/supplies**
  - **Join group purchasing groups**
  - **Limit number of products held in inventory; select products with multiple uses**
  - **Purchase locally grown products in season when available**

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Menu Cost

- **Ways to control menu costs while striving to meet both the DRIs and the *Dietary Guidelines for Americans 2010* as well as offering choice menus:**
  - **Plan and serve meals appropriate for multiple diets**
    - **Use herbs and spices for flavor; eliminate salt**
    - **Use vegetable and fruit purees for sauces; eliminate high fat, high starch gravies and sauces and high sugar icings**
    - **Use vegetable and/or meat trimmings or "left-overs" to make homemade fat free, sodium free broth for soups and cooking; eliminate commercial soup or gravy base**

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Menu Cost

- **Ways to control menu costs while striving to meet both the DRIs and the *Dietary Guidelines for Americans 2010* as well as offering choice menus:**
  - **Plan and serve meals appropriate for multiple diets, continued:**
    - **Use canola or corn oil sparingly when fat is needed; eliminate hard fats, such as butter, in cooking**
    - **Use whole grain pastas and breads**
    - **Use sweet potatoes or yams in varied ways as a starch item**

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Menu Cost

- **Ways to control menu costs while striving to meet both the DRIs and the *Dietary Guidelines for Americans 2010* as well as offering choice menus:**
  - **Plan and serve meals appropriate for multiple diets, continued:**
    - **Use beans and other legumes frequently as an entrée component or as a starch side item**
    - **Use fruit and fruit based items as desserts**
    - **Incorporate fruit, nuts, vegetables into baked items such as cookies and breads**
    - **Replace some fat and/or sugar in baked goods with fruit purees**

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Menu Cost

NOTE THAT MANY OF THE MODIFICATIONS TO MENU ITEMS THAT MAKE THE MENUS APPROPRIATE FOR MULTIPLE DIETS ALSO HELP THE MENUS MEET BOTH THE 2010 DIETARY GUIDELINES AND THE REQUIRED NUTRITIONAL REQUIREMENTS

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Menu Cost

- **Ways to control menu costs while striving to meet both the DRIs and the *Dietary Guidelines for Americans 2010* as well as offering choice menus:**
  - **Use basic ingredients in different ways for choice options (if preparing meals on-site for service)**
  - **If different ingredients are desired for choice options; then use basic ingredients in different ways on consecutive days**
  - **Incorporate lower cost protein items (beans, legumes, eggs) as choice entrees (use fewer red meat entrees)**

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Menu Cost

- **For example (use basic ingredient 2 different ways on same day):**
  - **<u>Menu 1:</u> Baked chicken with vegetable/mushroom sauce – served with brown rice pilaf, green beans, diced tomato salad, whole wheat bread slice, gingerbread with apricot puree topping**
  - **<u>Menu 2:</u> Chef salad with grilled chicken strips, diced tomatoes, black beans, whole grain roll, gingerbread with apricot puree topping**

Or the choice entrée might be:

  - **<u>Menu 3:</u> Chicken fajitas with black beans & rice, guacamole, diced tomatoes, whole grain tortillas, gingerbread with apricot puree topping**

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Menu Cost

- For example (use basic ingredient 2 different ways on consecutive days):

  - Today's entrée is baked chicken with vegetable/mushroom sauce
  - Tomorrow's entrée could be chicken pot pie (or shepherd's pie) with a potato topping instead of a pastry crust
    - Unused (never served) baked chicken becomes part of the pot pie
    - Potatoes (either white or sweet) are used as the topping – adds vegetables to the menu and eliminates high fat crust.

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Menu Cost

- Choice menus may increase labor cost if meals are prepared on-site.
- Labor cost can be controlled by:

  - Preparing fewer portions of any one item
  - Careful planning of food production operations so that items to be used in different ways or on consecutive days can be prepared at one time
  - Careful scheduling of personnel, using volunteers or lower cost personnel where appropriate, so that higher cost personnel are used more effectively

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Menu Planning: A Challenge

- **Planning menus that are cost effective, pleasing to the program's customers, and meet the required nutritional standards is a challenging task**
- **Quality menus are essential to a successful meal program, and careful menu planning should be a program priority**

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THANK YOU!!!

QUESTIONS????

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