



DMI, Chartwells, General Mills and Hubert Smoothie Station Program Pilot Results



National Yogurt Smoothie Program Objectives 2022 – 2023 School Pilots

- Create a scalable national program to deliver increased milk and yogurt consumption, deliver consistent messaging and leveraging partner assets.
- Leverage market penetration by partnering with national corporate management company with capabilities and reach with influential school districts.
- Develop Business Cases from these pilots to inform key audiences of value proposition thereby driving broader implementation.



PARTNERS





Program Overview

2022 – 2023 School Year

Engaged 144 schools to participate in a smoothie pilot program.

Report on preliminary results after first semester.

Schools received the following equipment to serve smoothies with milk and yogurt 3 days per week:

- Waring 16" Commercial Immersion Blender with wall hook
- Two 5-gallon buckets with lids to mix smoothies
- 3 cooler bags with cup dividers to transport or hold smoothies
- Transport cart
- Retractable banner to market and promote smoothie program
- 2- Plastic sign holders to promote smoothie program





Program Overview

2022 – 2023 School Year

Along with equipment, schools received support materials including:

- Implementation guidance and chef's tips
- 30 new smoothie recipes (15 breakfast, 15 lunch) using milk and yogurt co-developed by General Mills and Chartwells Culinary Teams.
- Marketing materials
- 4 chef videos created by Chartwells
- Equipment setup video created by Hubert



Introduction to
The Smoothie Station



The Smoothie Station
Recipe Preparation



Big Stix
Demonstration



Participating Schools

144 schools received kits across 10 states and regions:

- **10** - ADA Indiana
- **5** - ADA Mideast
- **10** - DairyMAX
- **4** - Dairy Farmers of WA
- **8** - Dairy Management West
- **33** - Midwest Dairy
- **41** - UDIM
- **17** - New England Dairy
- **1** - Dairy Farmers of WI
- **1** - Maine Dairy and Nutrition



Executive Summary





Executive Summary

How Data Was Collected

- Kitchen Staff Survey
- Student Survey
- MMS collected breakfast and lunch Average Daily Participation (ADP) directly from 130 schools.
- Chartwells provided purchasing information for:
 - Single serve 8oz. Milk
 - Bulk milk
 - Single serve 4oz. Yogurt
 - Bulk yogurt



Data was collected from November 2022 and November 2019
to avoid years when national universal meals were in place.



Executive Summary

Staff Survey Highlights

An online survey was sent to 130 participating schools.
113 responded (87% response rate).

Overwhelmingly positive response:

- Recipes were easy to follow.
- Equipment is reliable.
- Nearly 3 out of 4 schools said that the program was well received by students and foodservice staff.
- Over 90% of the respondents said getting school administrator support went well.
- Most participating schools said they would like to continue next year.

Challenges:

- Having adequate staffing to support the program
 - Out of 144 schools receiving kits, 14 schools were unable to implement due to labor issues (will start next semester or kit will be moved)
- Supply chain disruption, such as sourcing the right size cups and lids.
- Over 80% expected this issue to be temporary.



Introduction to
The Smoothie Station

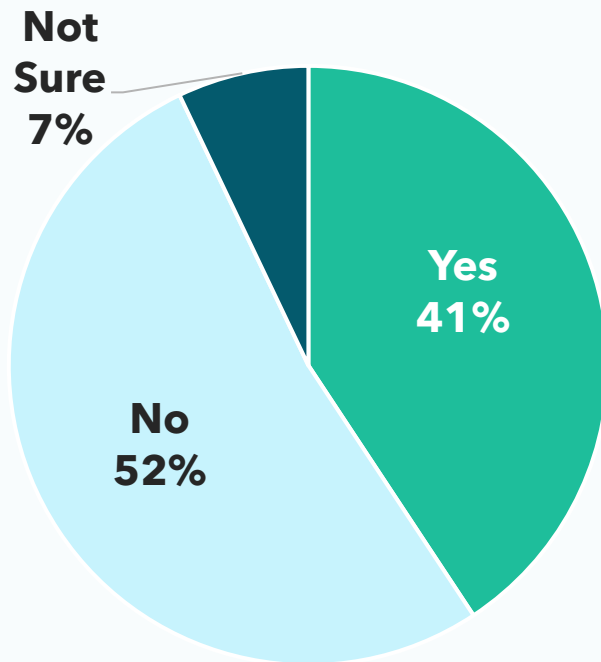
Nearly half
of participating schools
said the program
**increased meal
participation.**



Executive Summary

Staff Survey Highlights

Did your school ever offer smoothies prior to your participation in this program?



If it were up to you, how likely would you be to continue the Smoothie Station for at least the next school year?

78% would be very likely or likely to continue their Smoothie Station next year.





Executive Summary

Student Survey Highlights

Are you more likely to choose a school meal if smoothies are included?

- **Almost half of the responding students indicated they are more likely to choose a school meal if smoothies are included.**

At school, what is your favorite meal for smoothies?

- **Over one-third of the responding students say ALL MEALS are their favorite time for a smoothie.**

If smoothies were offered every day, how often would you choose to have a smoothie at school?

- **One quarter of the students would have a smoothie every day, if they were available daily**



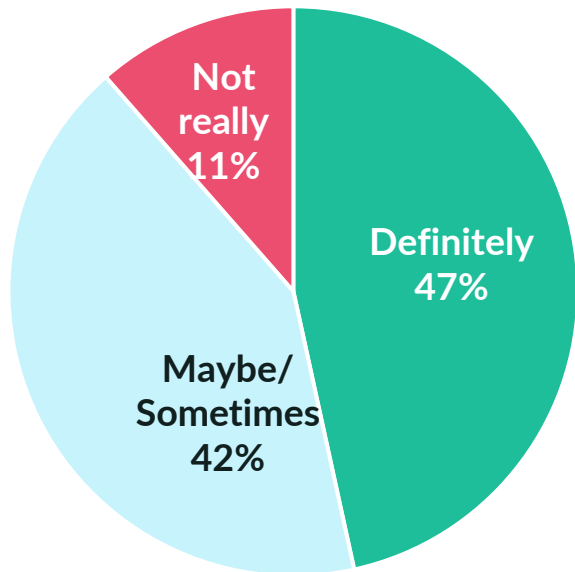


Executive Summary

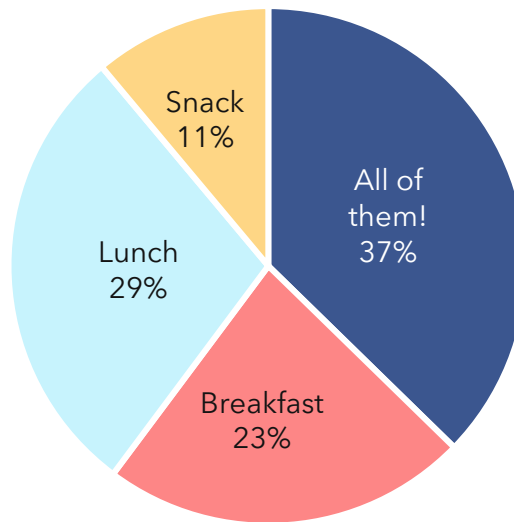
Student Survey Highlights

Schools delivered the online surveys directly to their students via email and QR code. 5,514 students from 85 schools responded.

Are you more likely to choose a school meal if smoothies are included?




At school, what is your favorite meal for smoothies?



Here, and in meal participation results, lunch was stronger than breakfast.

Of the 15 flavors, students loved:

- 1 Strawberry Banana 
- 2 Strawberry Mango 
- 3 Mixed Berry 

Students were less enthusiastic about the more unfamiliar flavors



Executive Summary

Meal Participation and Sales Results

Pilot schools outperformed national averages for meal participation and saw significant increases in dairy sales.

NATIONAL AVERAGES

Compared to a recent SNA survey that measured October 2021 to October 2022 meal participation:

- **Breakfast ADP +3%**
- **Lunch ADP +12%**

Compared to Prime Consulting All Channel report that measured milk sales in 2019 and 2022 :

- **Single Serve milk +1.1%**

Enrollment in pilot schools is down 2.8% in 2022 vs 2019

NOVEMBER DAIRY SALES RESULTS

Significant increases in unit sales:

- **563% increase** in bulk milk
- **57% increase** in bulk yogurt
- **15% increase** in single serve yogurt



Executive Summary

Meal Participation

In the staff survey, half of the reporting schools felt the smoothie program increased overall meal participation.

- ADP data from participating schools supports that observation when compared to the national average from a similar timeframe.
- To account for variations in enrollment, ADP is converted from a count of participating students to the average % of enrolled students participating.

Participating Schools		Compared to All Chartwells schools (2019 vs. 2022)	
Meal Participation	% Change in ADP	All Chartwells Schools	Difference
Breakfast ADP	-7.8%	- 2.5%	-5.3%
Lunch ADP	6.3%	-8.9%	15.2%

*According to a recent poll by School Nutrition Association, comparing October 2022 to October 2021



Executive Summary

Meal Participation

In the staff survey, half of the reporting schools felt the smoothie program increased overall meal participation.

- ADP data from participating schools supports that observation when compared to the national average from a similar timeframe.
- To account for variations in enrollment, ADP is converted from a count of participating students to the average % of enrolled students participating.

Participating Schools		Compared to All Chartwells schools (2019 vs. 2022)	
Meal Participation	% Change in ADP	All Chartwells Schools	Difference
Breakfast ADP	-5%	- 2.5%	-2.5%
Lunch ADP	.48%	-8.9%	-8.42%

Results with the following S/Rs omitted: New England, Maine, and Indiana.



Executive Summary

Dairy Sales Results

Combining bulk and single serve, November 2022 over November 2019:

- Based on declining enrollment and meal participation, total meals in 2022 were down **-40,338** in November and **-681,120** annually vs 2019.

Sales Metric	Unit Size	Total Units Pre	Total Units Post	Incremental Units	% Change in Units	Annualized Incremental Units
Bulk Milk	8 oz.	2,768	18,352	15,584	563%	155,840
Single Serve Milk*#	8 oz.	599,945	594,054	-5,891	-1%	-58,910
Total 8 oz servings				9,693		96,930
Bulk Yogurt	4 oz.	56,192	88,088	31,896	57%	306,844
Single Serve Yogurt	4 oz.	60,316	69,572	9,256	15%	63,757
Total 4 oz servings				41,152		411,517

*The Prime Consulting All Channel report shows a 2.1% decline in milk volume from 2019 to 2021.

2.8% decline in enrollment in pilot schools = (2,512 students vs 2019)



Executive Summary

Annualized Milk Pounds

Smoothie Station Pilot drove incremental milk and yogurt sales and outperformed the national average for single serve milk.

In 130 participating schools:

- Enrollment was down **-2.8%**.
- Based on declining enrollment and meal participation, total meals in 2022 were down **-40,338** in November and **-681,120** annually vs 2019.

Sales Metric	Annualized Milk Pounds Pre	Annualized Milk Pounds Post	Annualized Incremental Milk Pounds
Bulk Milk	14,877	98,641	83,764
Single Serve Milk	3,224,704	3,193,040	-31,664
		Total from milk:	52,100
Bulk Yogurt	156,326	238,790	82,464
Single Serve Yogurt	171,583	188,718	17,135
		Total from yogurt:	102,879
		Overall Total:	154,979

Thank You



Appendix



Staff Survey

Detailed Results





Staff Survey Methodology

The online survey was conducted with the school nutrition contacts at the participating schools - elementary schools, middle/junior high schools, and high schools.

- The survey consisted of 16 questions that took an average of 10 minutes to complete.
- Responders were mostly school-level kitchen managers, not in charge of meal planning.
- The final dataset included one response from each school.
- If a school had more than one response, we used the response that was the first fully completed survey submitted by the school.

Survey Timing: November 8 - December 2, 2022

- Sent via email with follow-up reminders to 130 schools.
- 113 schools submitted a response;
- an 87% response rate.



Staff Survey Insights

The Smoothie Program was well received by the participating schools.

- Three-quarters of the schools or more agreed with 11 positive statements about the program.
- 90% or more of the respondents agree the recipes were easy to follow and the equipment is reliable.
- Over 90% of the respondents said getting school administrator support went really well or well.

Respondents said the equipment is reliable and easy to use.

- Some commented that the immersion blender is too big and heavy for some staff to handle, and it was hard to pour smoothies from the buckets.
- Some respondents also said the pop-up banner was too large to use, and they would prefer smaller signage.

Once the program was up and running:

- Almost three out of four schools said the program was extremely or very well received by students and foodservice staff.
- A slightly lower percentage of schools said administrators received it extremely/very well.
- Participants reported a little over half the teachers received the program extremely or very well, which was the lowest scoring segment.



Staff Survey Insights

The most challenging parts of the project were having the right size cups and lids and having adequate staffing to support the program.

- However, less than 20% of the participating schools see these two items as on-going challenges in future years.

When smoothies were served:

- One-third of the schools said they most frequently served smoothies once a week at breakfast and at lunch.
- Just over one-quarter served the smoothies at breakfast and at lunch three times/week.
- Almost half of the participating schools said the smoothies they served were part of a reimbursable meal.

- About half of the schools said the smoothie program increased meal participation, with a greater percentage of these schools being elementary schools.
- Over three-quarters of the schools said if it was up to them, they would be very likely/likely to continue the smoothie program next year.



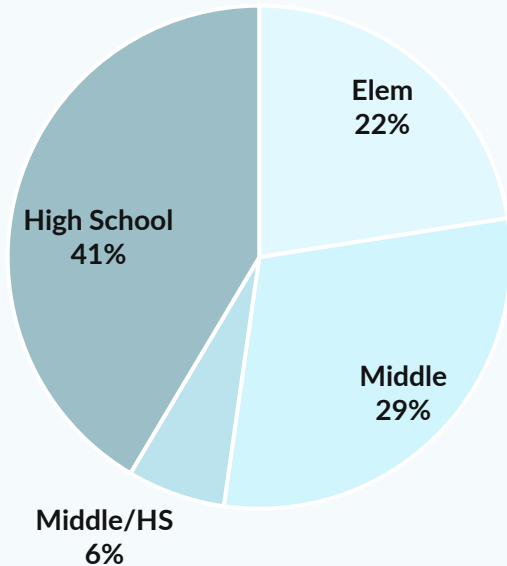
Staff Survey Results

Respondent Profile

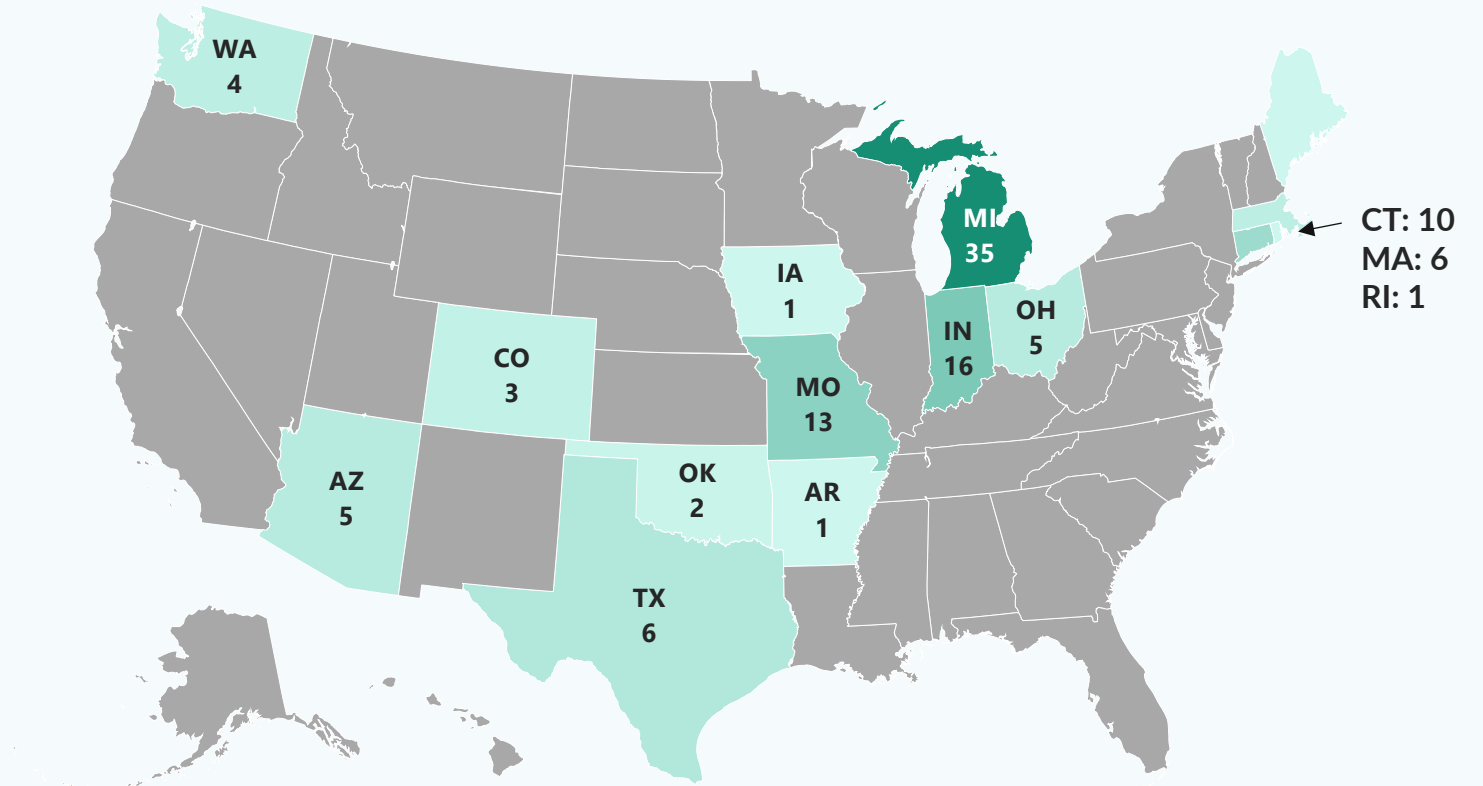
Count of Respondents

Completed Survey	108
Partially Completed	5
TOTAL	113

Grade Level of Respondents' Schools



Chartwell Staff Survey # of Responses by State

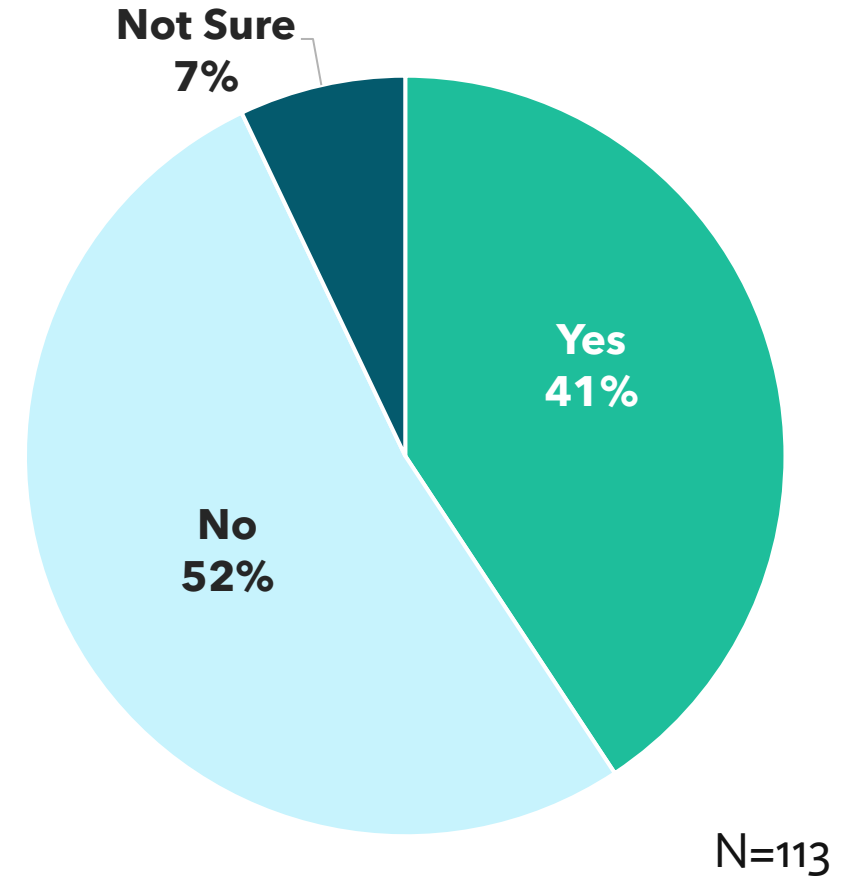




Staff Survey Results

Did your school ever offer smoothies prior to your participation in this program?

- Over half of the responding schools had not offered smoothies prior to this pilot program.
- 41% of the responding schools offered smoothies prior to the pilot program.
- Less than 10% of the responding schools are not sure if their school offered smoothies before.





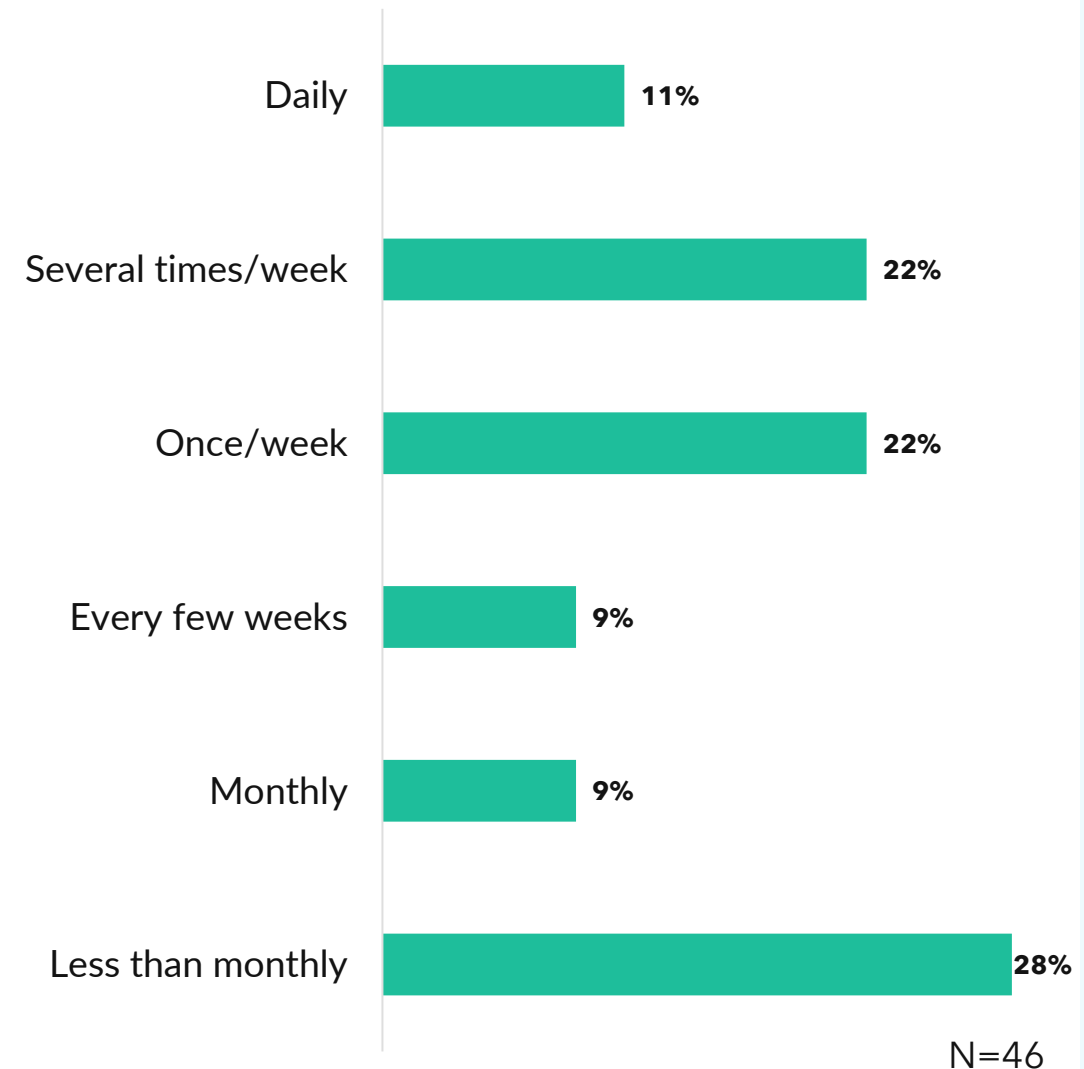
Staff Survey Results

Prior to this program, how often did your menu offer smoothies?

Schools that previously offered smoothies were most likely to offer them once to several times per week.

Of the schools that provided smoothies prior to this pilot:

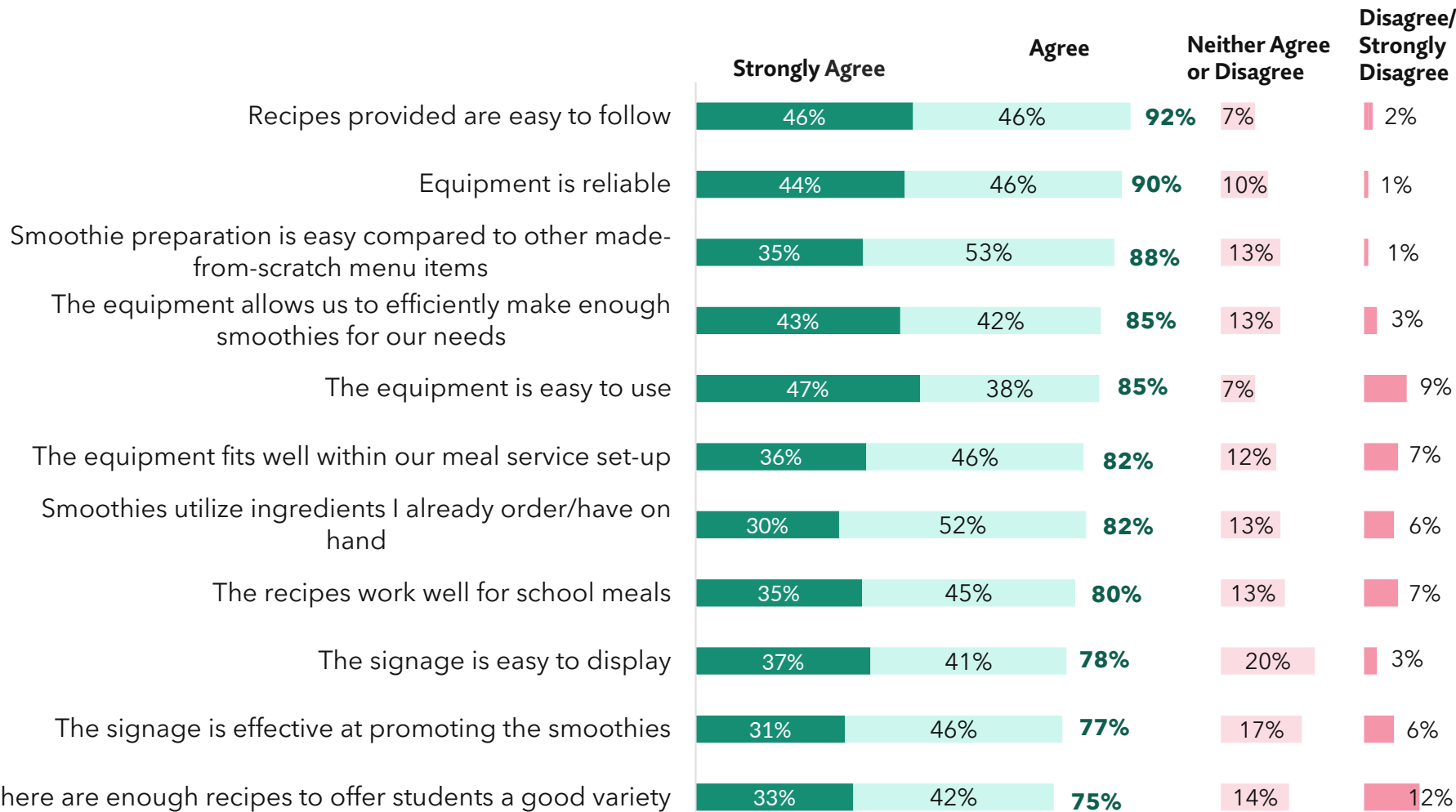
- 44% offered smoothies several times a week or once per week.
- 27% offered them less than once/month.





Staff Survey Results

To what extent do you agree with the following statements about the Smoothie Program?



N=113

A minimum of 75% of respondents strongly agree/agree with the eleven positive statements about smoothies.

The items with the highest agreement were:

- Recipes provided are easy to follow **(92%)**
- Equipment is reliable **(90%)**

12% or fewer of the respondents disagree with any of the statements.



Staff Survey Results

What, if anything, would you change about the equipment or signage you received for this program?

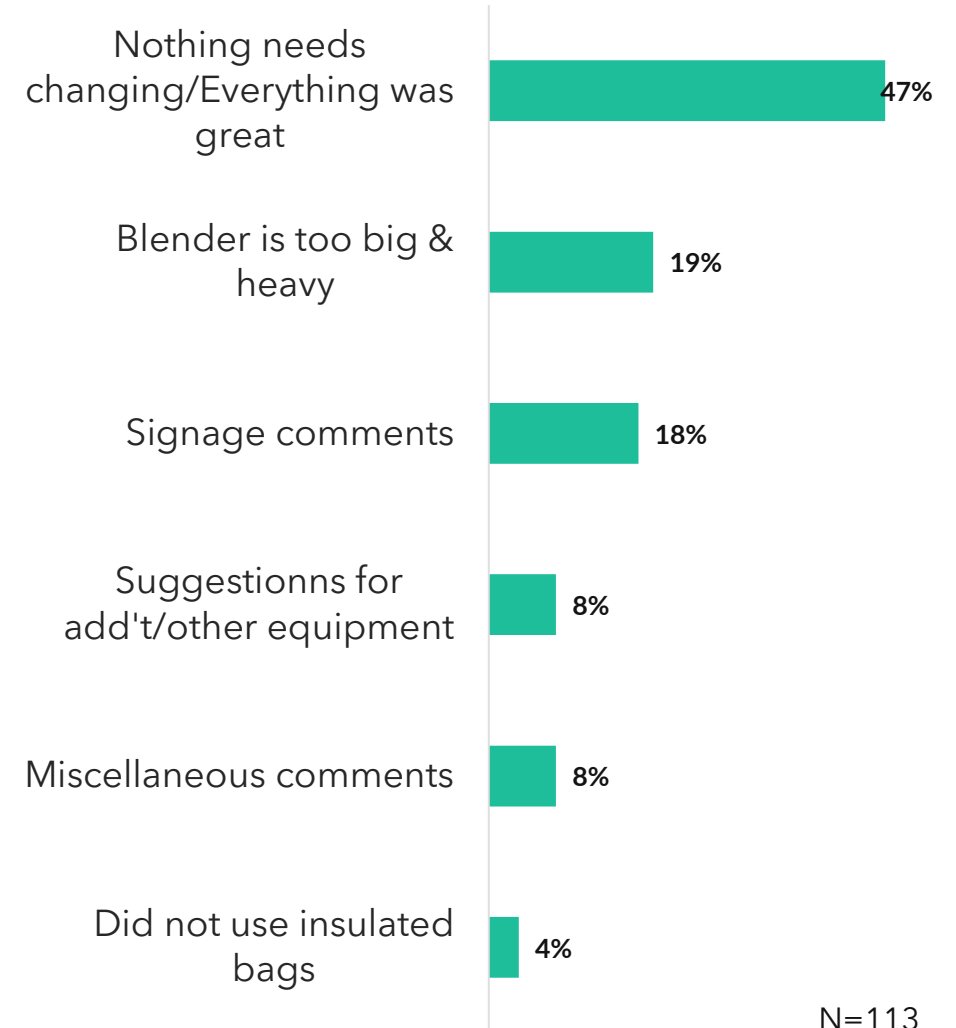
In an open-ended question, almost half of the schools were happy with the equipment and signage they received.

Equipment:

- Immersion blender is very large and heavy. It is too heavy for some to handle. And it is too big to use on a counter, and to make small batches of smoothies.
- Would like a pour spout or spigot on the bucket to make pouring smoothies easier.
- Some schools did not use the insulated bags.
- Would like to receive advance notice of what and when equipment is coming.

Signage:

- Some schools said banner was too large. Schools would like other/smaller signs. Window clings were suggested.
- Make signs more kid-friendly and visually catchy.
- Provide a template that schools can use to personalize their materials. Would like to advertise the smoothie flavor of the day.
- Two reported not receiving the pop-up sign. One reported receiving a damaged sign.





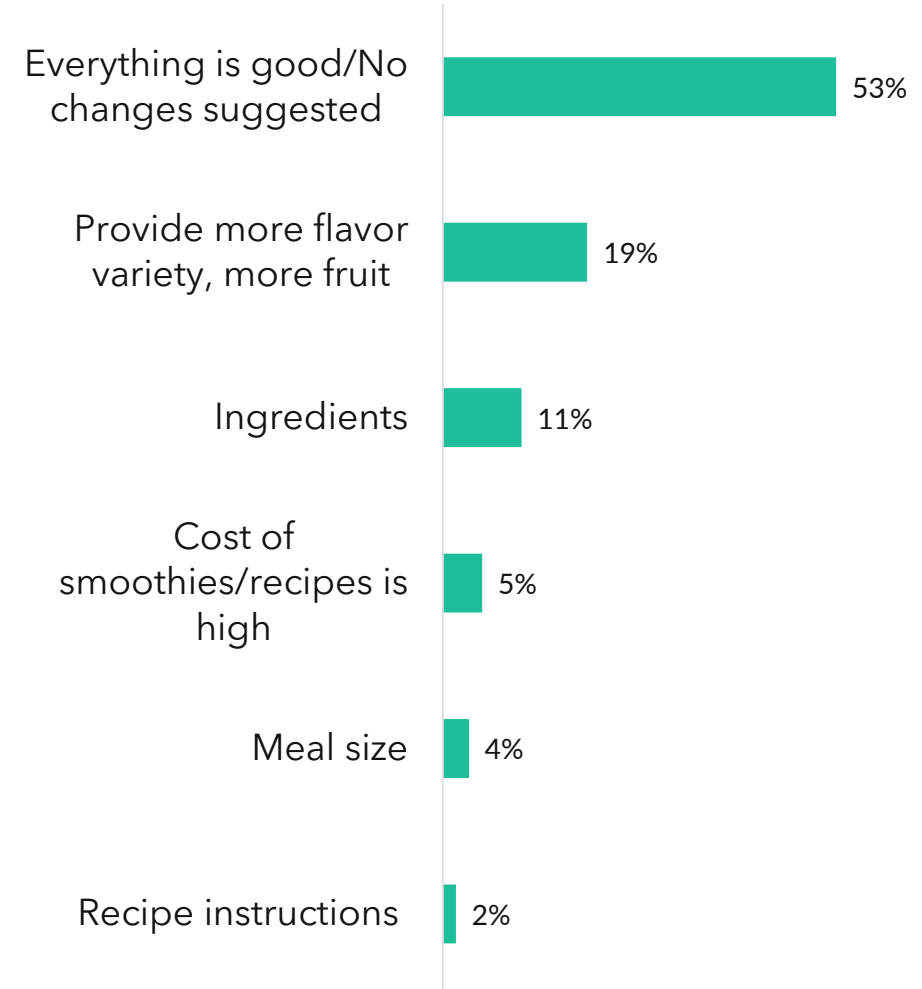
Staff Survey Results

What, if anything, would you change about the recipes or menu recommendations you received for this program?

Over half of the respondents again noted they were happy with the recipes and menu recommendations and would not change anything.

Schools also shared suggestions on the recipes, variety of flavors and more.

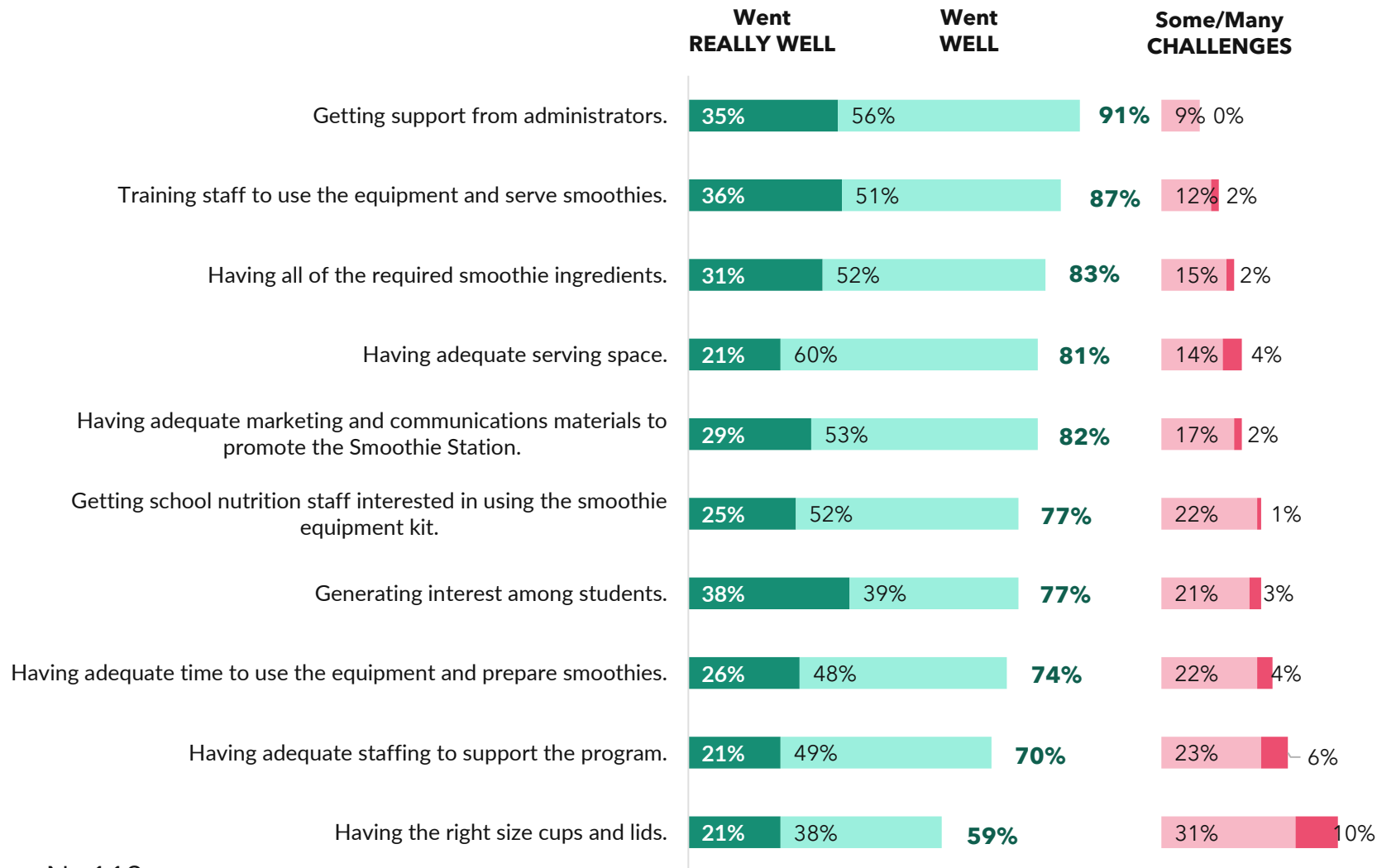
- Schools would like to see more variety in the smoothies, including more fruits. They would like more strawberry smoothie recipes since strawberry flavor is very popular.
- Some schools did not try the vegetable recipes because they did not think the students would like them.
- They prefer more kid-friendly recipes and not as many unusual flavors.
- Some ran into ingredients not being available such as blueberry/strawberry yogurt, dragon fruit and mangoes.
- Several thought they needed to add a grain or something else to make the smoothies a complete meal. Students commented that the smoothies were not filling enough and they were still hungry.
- Schools commented that the ingredients and the smoothies themselves were expensive. They prefer less expensive recipes.





Staff Survey Results

Please identify what went well or what presented challenges in implementing the Smoothie Station in your school.

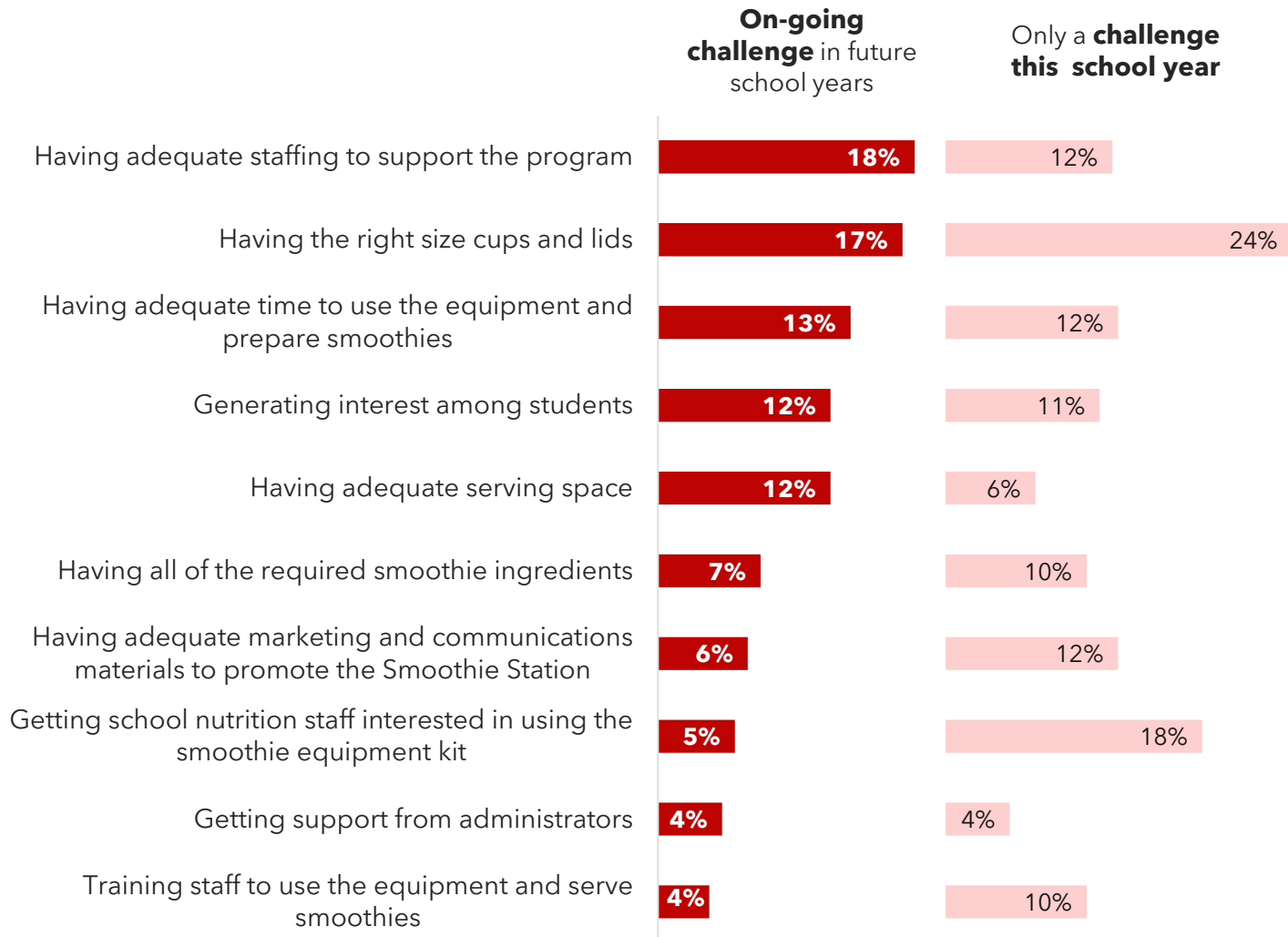


- **Getting support from administrators was the top-rated item** that went really well/well.
- **8 out of 10 schools** said training staff, having all the required ingredients, having adequate space, and adequate marketing materials all went really well/well.
- The most challenging items were having the right size cups & lids (supply chain issues) followed by adequate staffing.



Staff Survey Results

Of the challenges you identified, which do you anticipate will be on-going in future school years vs only this school year.



N=113

The most common on-going challenges are having adequate staffing and having the right size cups and lids.

The next most common anticipated on-going challenges are:

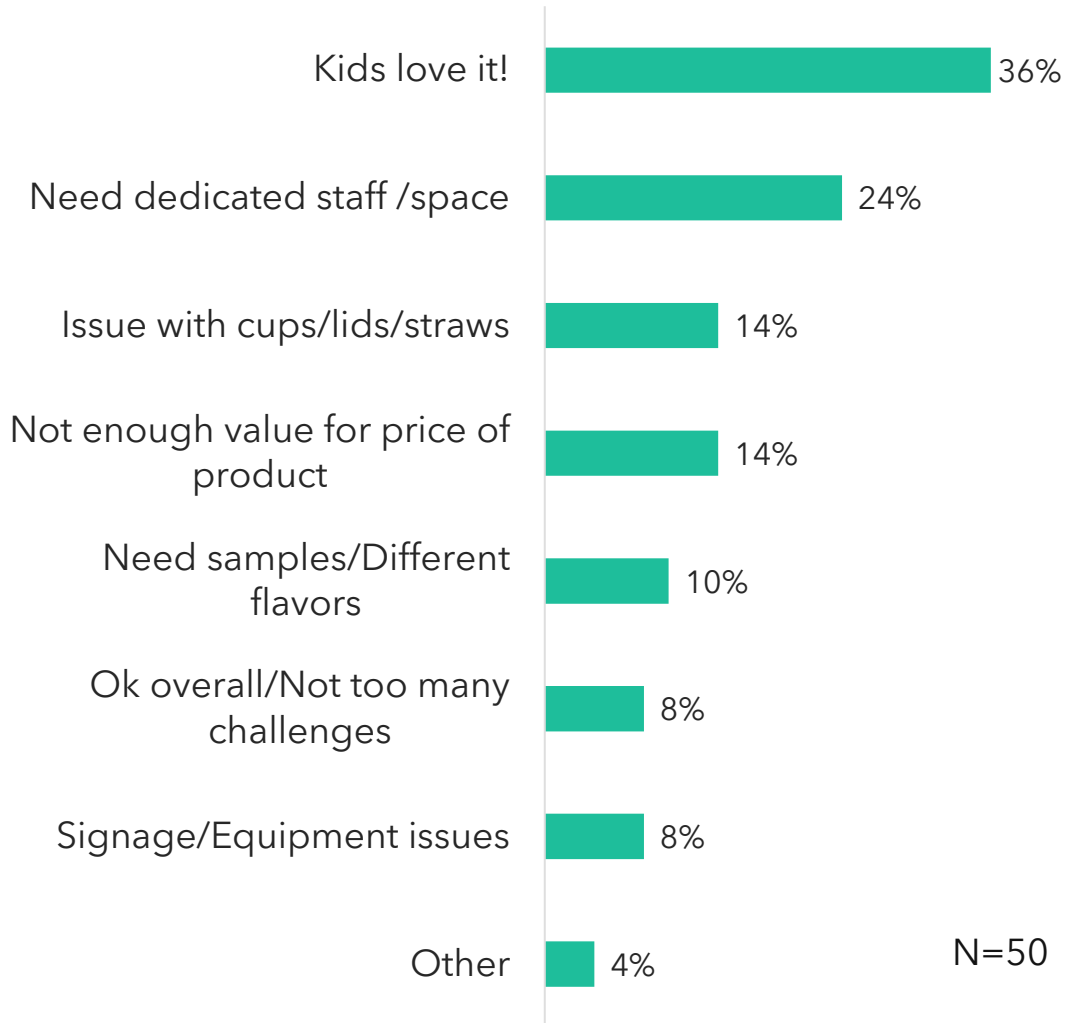
- Having adequate time to prepare smoothies
- Generating interest among students
- Having adequate serving space

Getting school nutrition staff interested in using the smoothie equipment was a challenge this year, but a lot less respondents think it will be an on-going challenge.



Staff Survey Results

If applicable, please share anything else that is not mentioned above that went well or presented challenges with the Smoothie Program.



The most common constructive comments from staff members expressed the need for dedicated staff and space to continue the smoothie program; smoothie-making is labor-intensive.

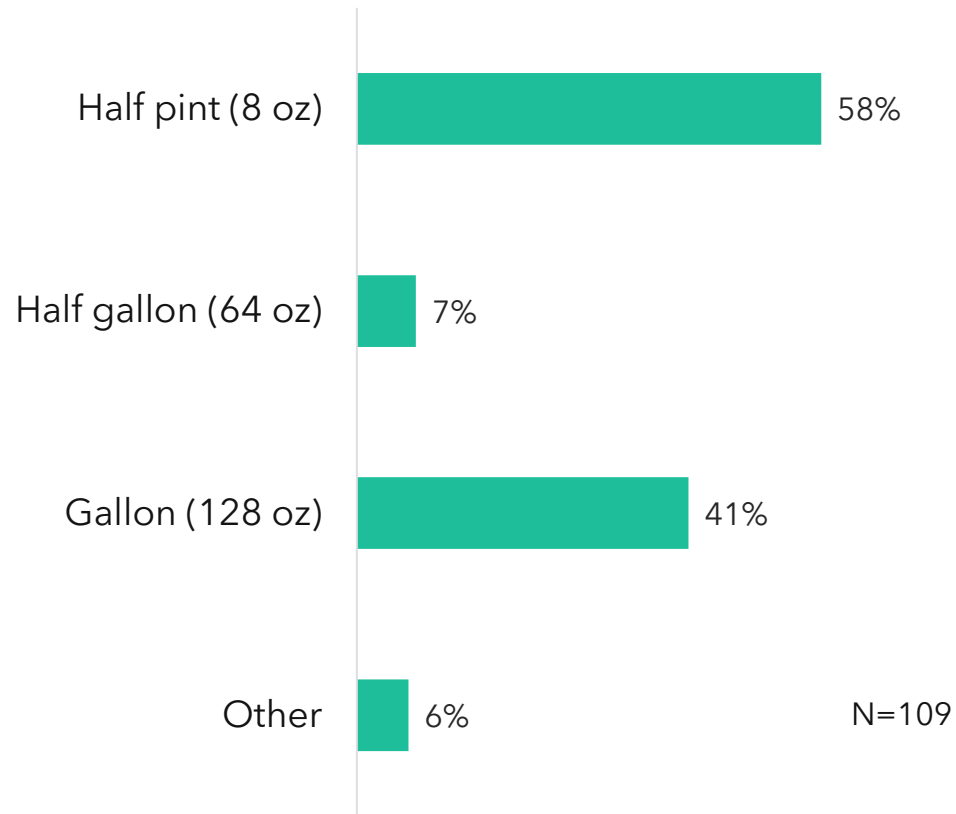
Other common themes:

- Students have a hard time carrying a tray with a lidded cup on it without spilling it.
- Wider straws are needed; milk straws are too narrow for smoothies.
- The price point is high for the smoothies.
- Students do not think a smoothie is enough food for a meal.
- Schools would like additional signage.



Staff Survey Results

What size milk packages did you use to make the smoothies? (Check all that apply)



Eight-ounce containers of milk and gallon containers are the most commonly used milk packages for making smoothies.

- More than half of the schools used half pints.
- About 10% of the schools noted using multiple sizes of milk when making smoothies.
- Almost all noted they used both 8 oz and 128 oz (gallon) containers.

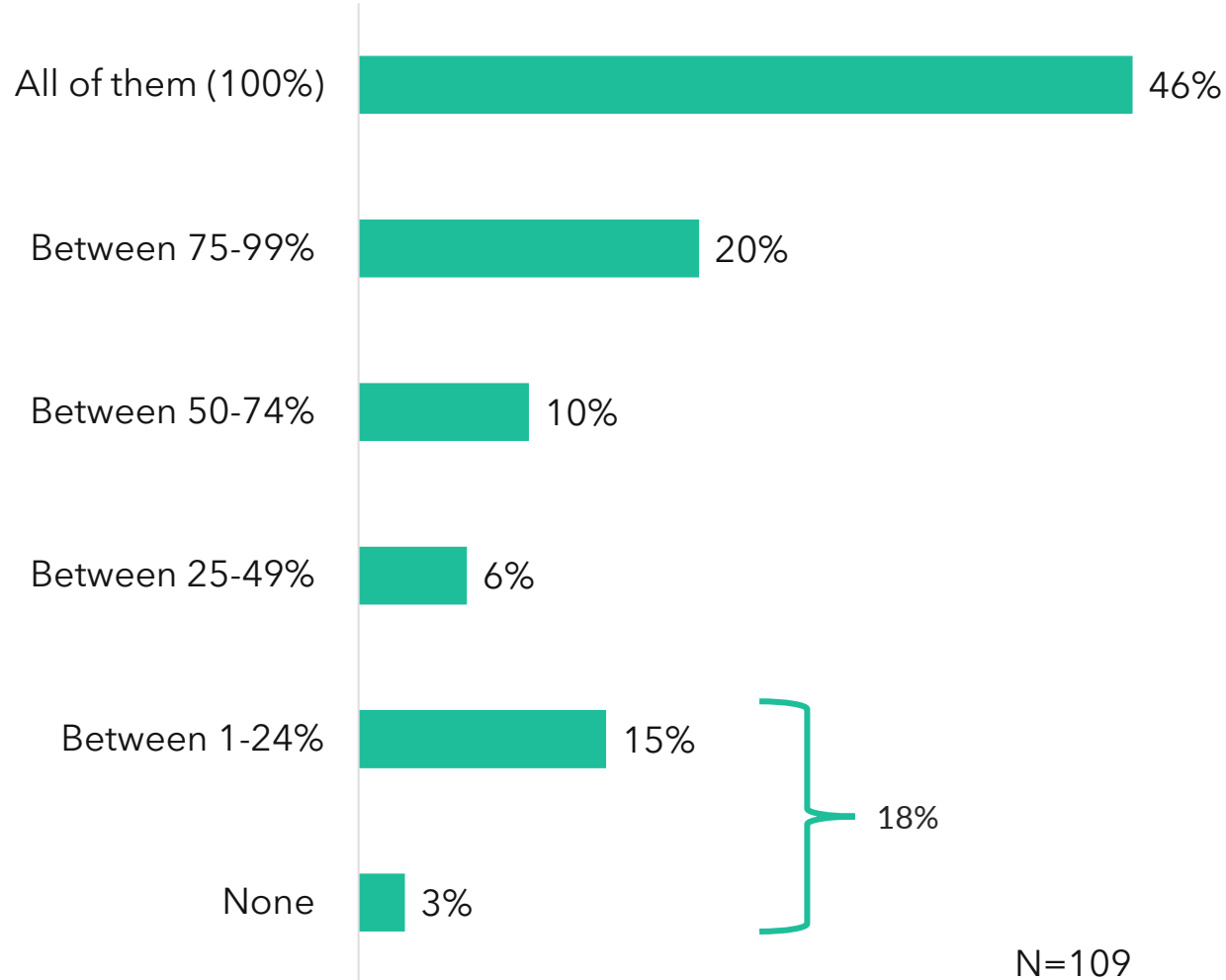
“Other” includes:

- 4 oz milk
- Milk carton
- Use yogurt/don't use milk



Staff Survey Results

About what percent of the smoothies served through this program were part of a reimbursable meal?



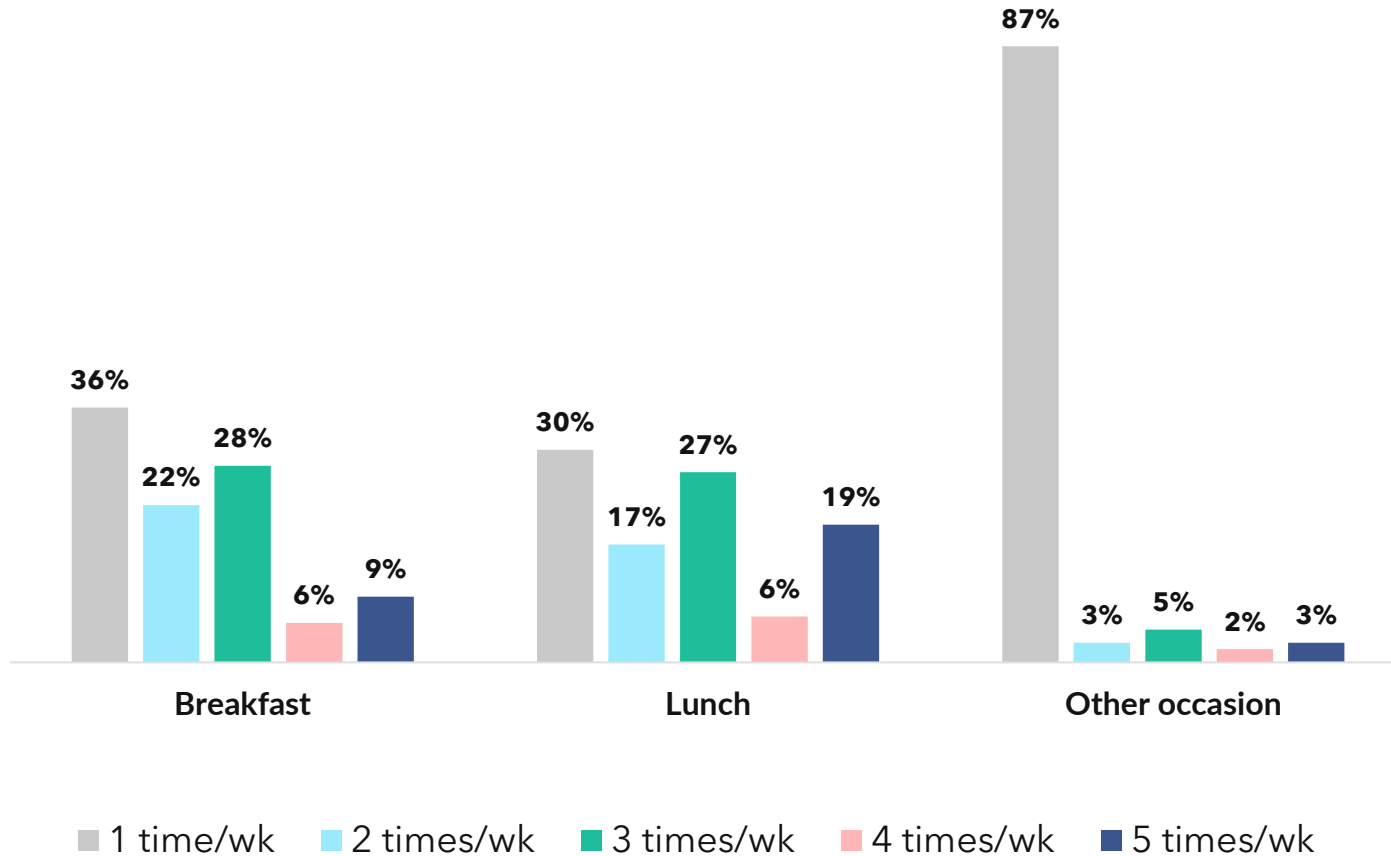
Almost half (46%) of the responding schools indicated 100% of the smoothies were part of a reimbursable meal.

Eighteen percent of the responding schools indicated less than 25% of the smoothies were part of a reimbursable meal.



Staff Survey Results

On average, how many times a week did you serve smoothies during the program at each of the occasions below?



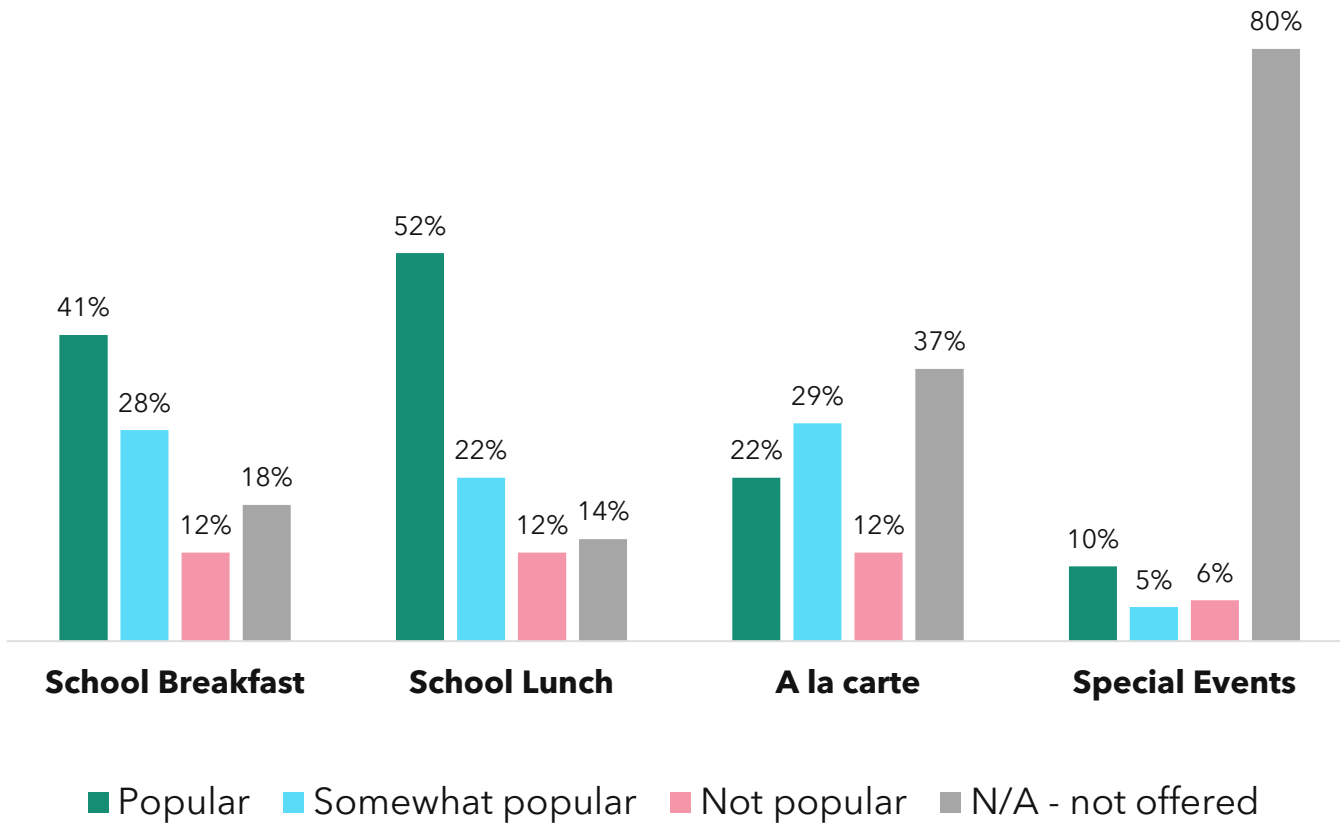
About one third of the responding schools reported that on average, smoothies were served once per week for breakfast and lunch.

- The second most common frequency for serving smoothies for breakfast and lunch was three times per week.
- Serving smoothies for other occasions most commonly happened once per week.
- Serving smoothies five times a week was more likely to happen at lunch than breakfast or an “other” occasion.



Staff Survey Results

How popular were smoothies with students at the following meals/feeding opportunities?



N=109

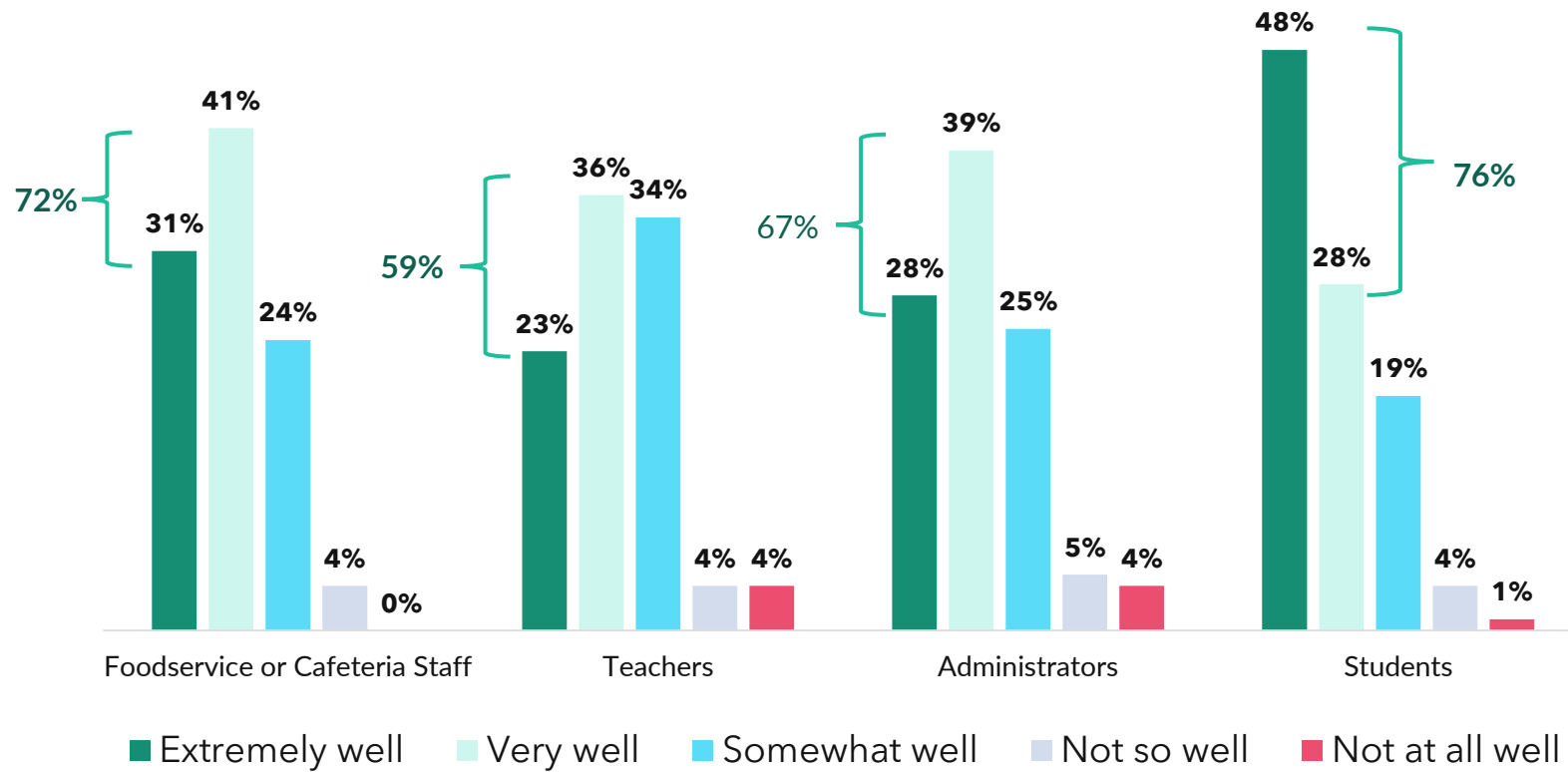
Close to one-half of the responding schools reported that smoothies were “popular” at breakfast and lunch, with lunch showing a little more popularity.

- About one-quarter of the responding schools said smoothies were “somewhat popular” at breakfast, lunch and a la carte.
- One third (37%) of the responding schools reported smoothies were not offered a la carte.
- The vast majority of the schools (80%) did not offer smoothies at special events.



Staff Survey Results

In your observation, how well received was the smoothie program among staff and students?



N=109

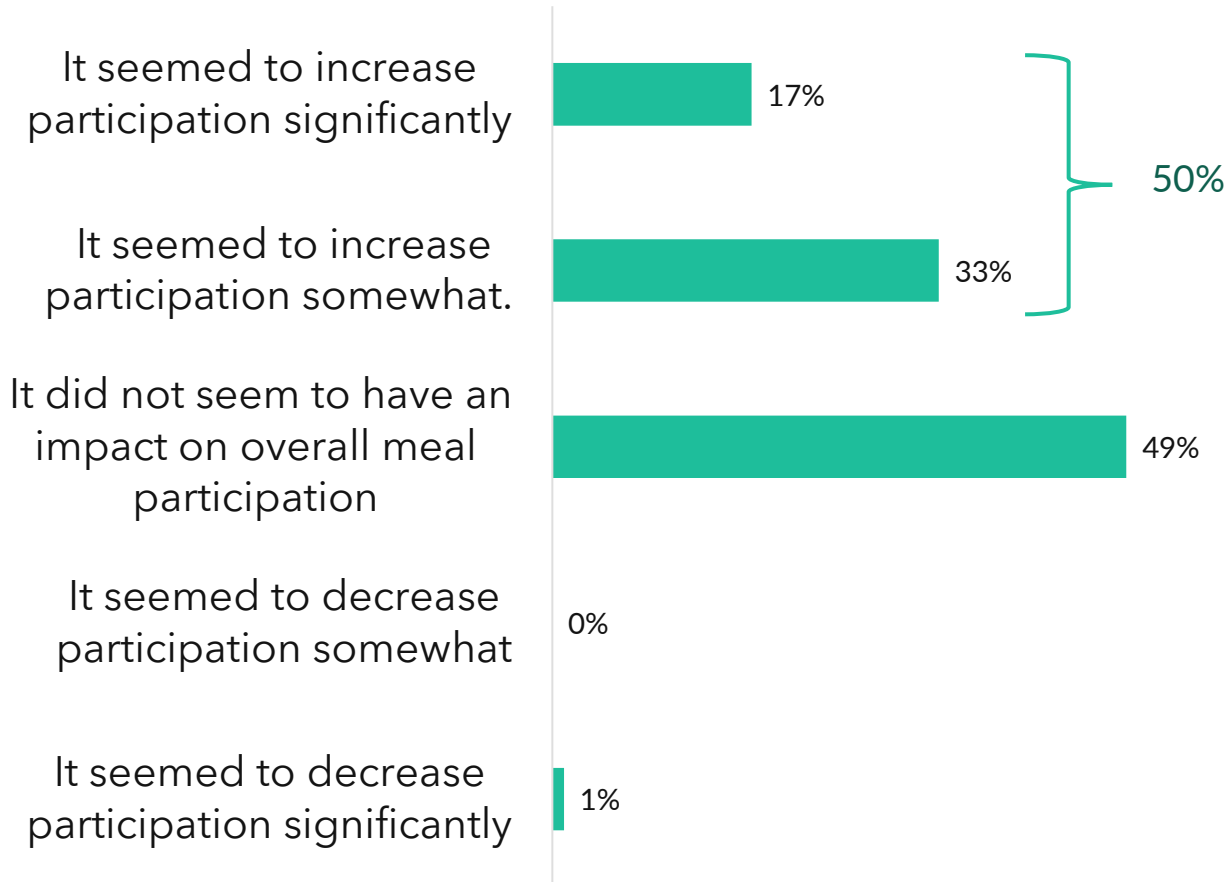
Over half to three-quarters of the staff and students were reported to have received the smoothie program extremely or very well.

- Schools reported students with the greatest enthusiasm for the smoothie program, with the foodservice staff following closely behind.
- Teachers and administrators had a lower amount of enthusiasm for the smoothie program than did the students and foodservice staff.



Staff Survey Results

In your observation, what impact did the Smoothie Station have on overall meal participation?



N=109

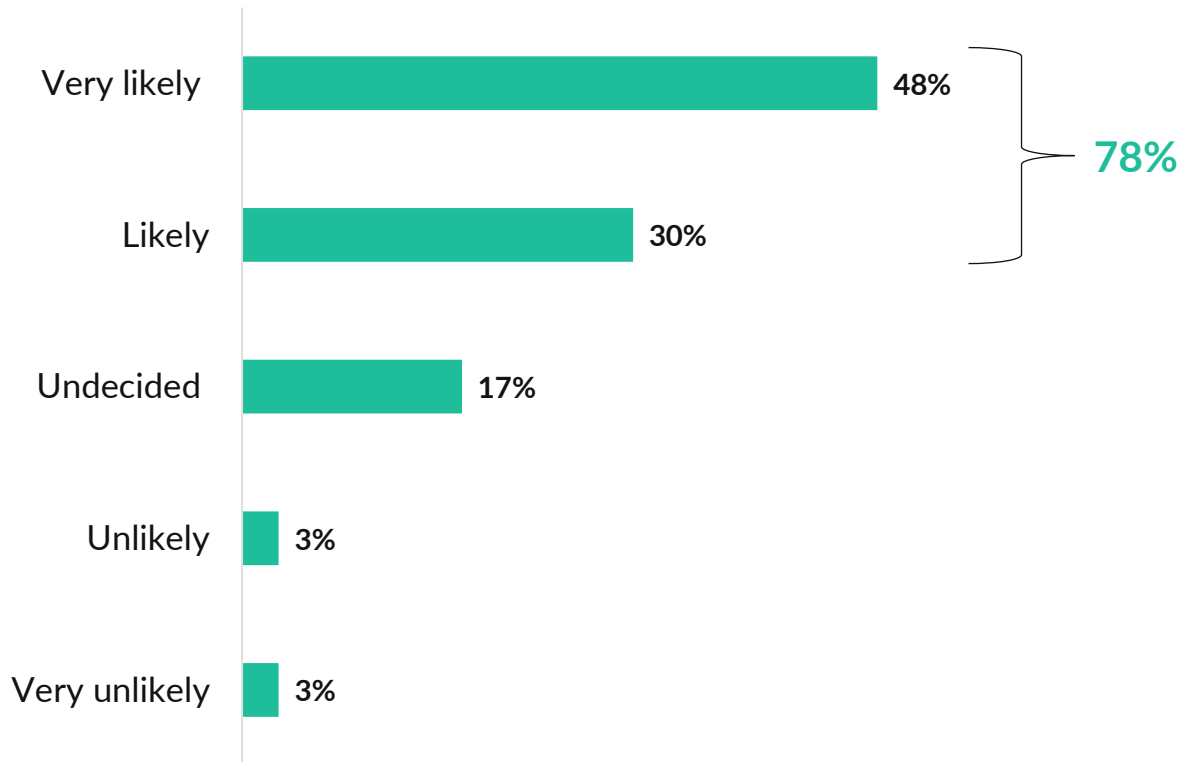
Half of the reporting schools thought the smoothie program increased overall meal participation; one-third said it “increased somewhat” and almost 20% said it “increased significantly”.

- The other half of the respondents did not think the smoothie program had an impact on meal participation.
- Only one respondent felt that the smoothie program significantly decreased meal participation.
- Elementary schools were more likely to say that smoothies increased meal participation (79%) than middle (42%) and high schools (40%).



Staff Survey Results

If it were up to you, how likely would you be to continue the Smoothie Station for at least the next school year?



N=108

78% of the responding schools say that if it was up to them, they would be very likely or likely to continue their Smoothie Station next year.

- Only 6% of the responding schools say they would be unlikely/very unlikely to continue the Smoothie Station next school year.
- Elementary schools are more likely to want to continue the Smoothie Station (87%) than middle schools (74%) or high schools (71%).



Staff Survey Results

Please share any comments about the Smoothie Station Program that was not covered above (optional).

Schools will continue with smoothies:

We will be offering a Smoothie program all year; the kids love them.

It's so easy and uses up old yogurt and milk and banana - - kinda a no brainer to offer with parfait.

I would continue the smoothies, but not 3 times a week.

Impact on ADP:

The smoothies went over well. Served about 15 per lunch period but it seemed like the students took the smoothies rather than the parfaits so it did not necessarily increase participation; it just changed what they ordered.

Serving Smoothies is Challenging

It is a lot of work. It is physically demanding, and the buckets are heavy.

In my opinion the smoothies program was a challenge because the children would rather have a hot meal vs a smoothie for breakfast.

The fact that a smoothie isn't a full compliant meal hurt how many kids got it.

"Kids love the smoothies"
was the most common response to the final question asking schools to share anything that was not already covered.

Student Survey

Detailed Results





Student Survey Methodology

The online survey was conducted from November 9 to December 5, 2022, with students at 130 participating schools.

- The survey consisted of 7 questions and took an average of 1 minute to complete.
- The school nutrition contact at each school received a unique link to the survey for just their school from Chartwells. They then shared that link with students and encouraged them to take the survey.
- A total of 5,514 students from 85 schools participated in the survey; that is 64% of the participating schools. The number of responses from each school ranged from 1 response to 420 responses, with an average of 64 responses per school.
- The final dataset contains both partial and completed surveys.



Student Survey Results

Executive Summary

From the Student Survey:

- About half of the students who completed the student survey said they tried the smoothies.
- Of all the students, about half said they loved the smoothies and close to another half said “they are okay”.
- A prime reason students did not try the smoothies was because they were not aware of the smoothies being offered.
 - Students also cited smoothies as being too expensive, they do not like the taste or texture, and many students pack their lunch or eat at home.
- About half of the students said they are more likely to choose a meal if smoothies are included.
- The most common response when asked what is their favorite meal for smoothies was “all of them”. Lunch was the next most favorite as indicated by about a third of the students, followed by lunch with about one quarter of the students indicating this.
- There is no clear-cut preference among students for how often they would choose to have a smoothie at school. Responses were fairly evenly split between every day, 1-2 days per week, and 3-4 days per week.

Flavor Preferences:

- Strawberry-banana smoothies are the #1 rated flavor of smoothies, as indicated by two-thirds of the students.
- This is followed by strawberry mango and mixed berry.
- Students were less enthusiastic about the more unusual flavors offered (e.g., carrot/ginger/peach, sunbutter pear, avocado/kale/mango).

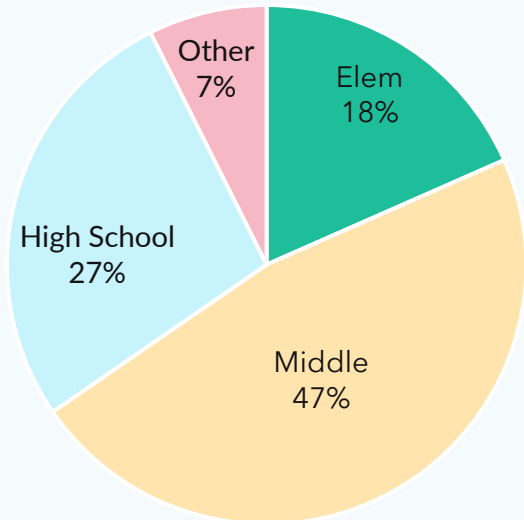


Student Survey Results

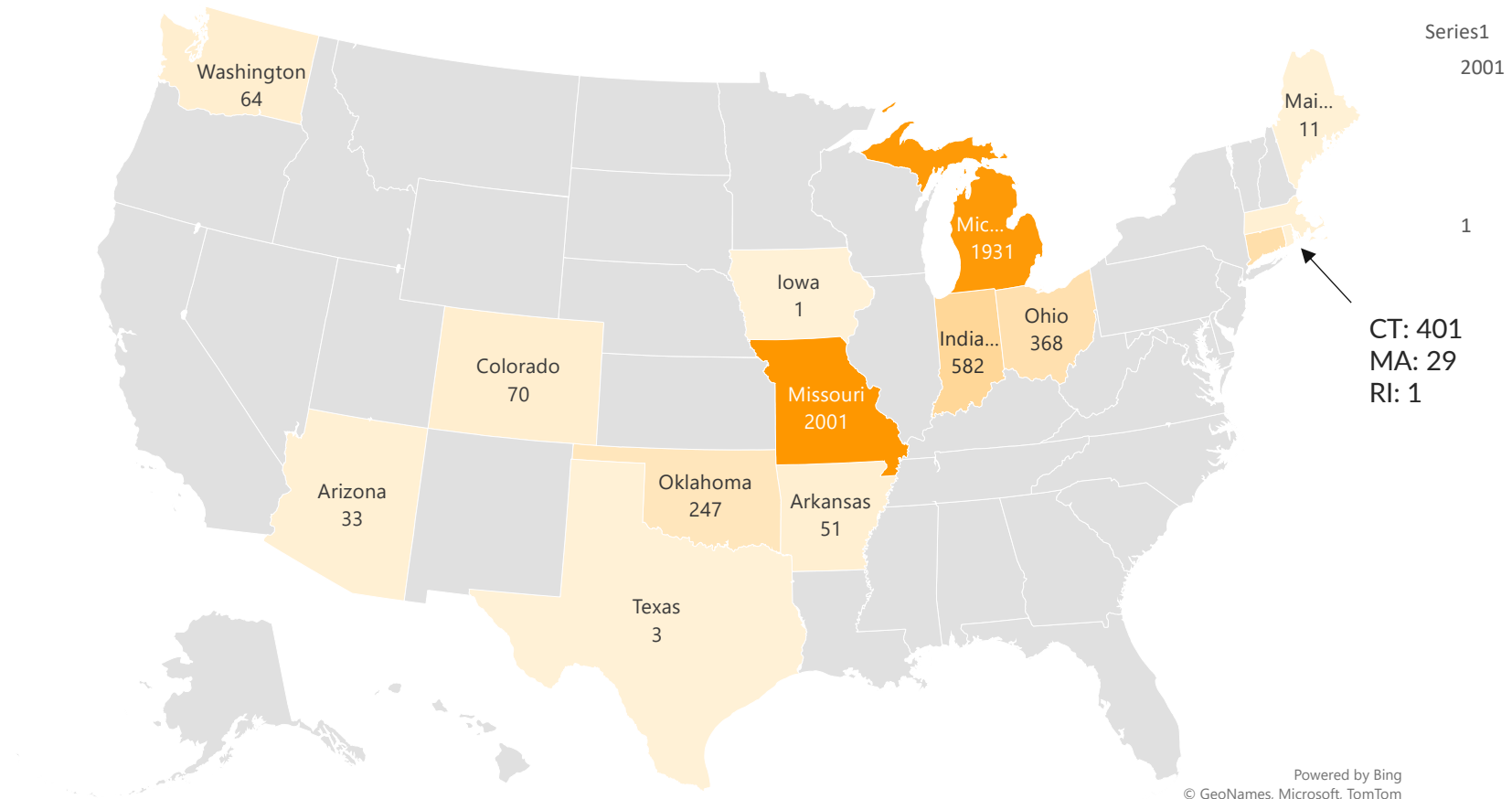
Respondent Profile

Count of Respondents	
Completed Survey	5,306
Partially Completed	487
TOTAL	5,793

Students' Grade Level



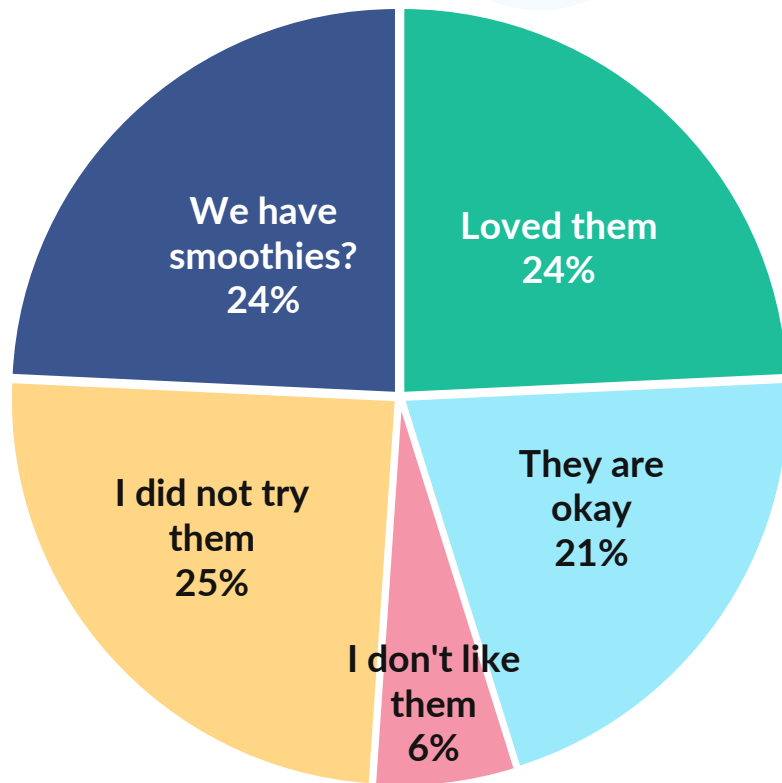
Chartwells Student Survey Number of Student Survey Responses by State





Student Survey Results

Did you try smoothies at school? What did you think?



N=5,793

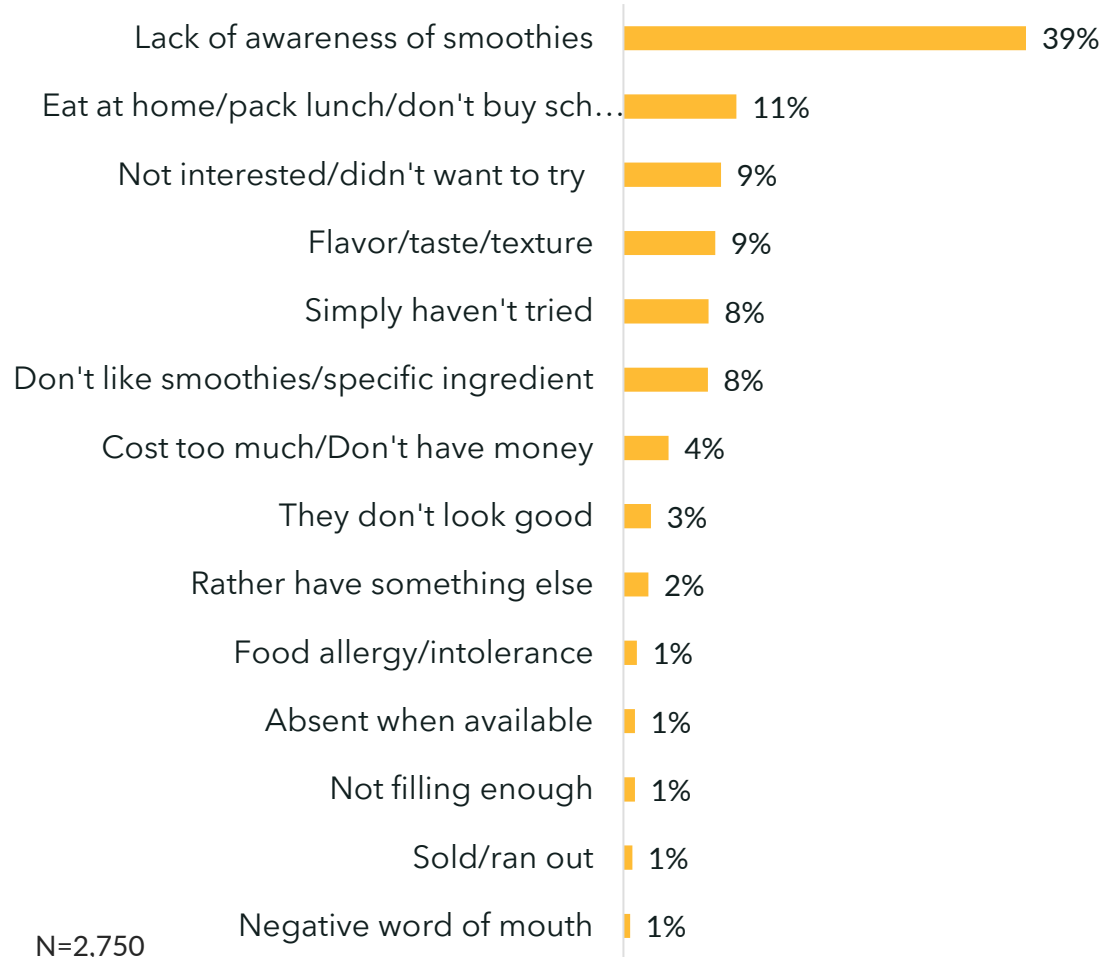
Note: some schools sent the survey to all students, even those that don't eat in the cafeteria

- One quarter of the students who tried the smoothies said they loved them.
- Half of the responding students did not try the smoothies or were not aware of the smoothies at school.
- Just six percent of the students reported that they do not like smoothies.



Student Survey Results

Why didn't you try them? What don't you like about smoothies at school?



Lack of awareness that smoothies were available at school was the most common reason students gave for not trying the smoothies.

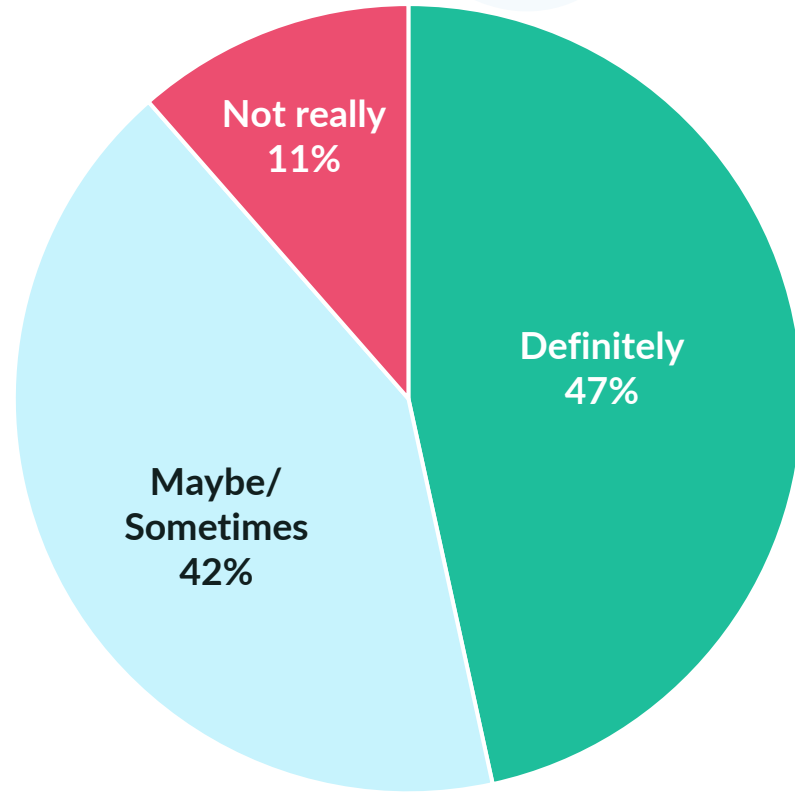
Other common reasons for not trying smoothies included:

- Students commented that the smoothies cost too much, some stating the cost is \$3 or \$4.
- A number of students do not like the looks, texture or taste of the smoothies. Others commented that they do not like some of the ingredients in the smoothies (bananas, strawberries, yogurt, etc.)
- Many students either pack their lunch or eat at home and do not buy any meals at school.



Student Survey Results

Are you more likely to choose a school meal if smoothies are included?



N=2,525

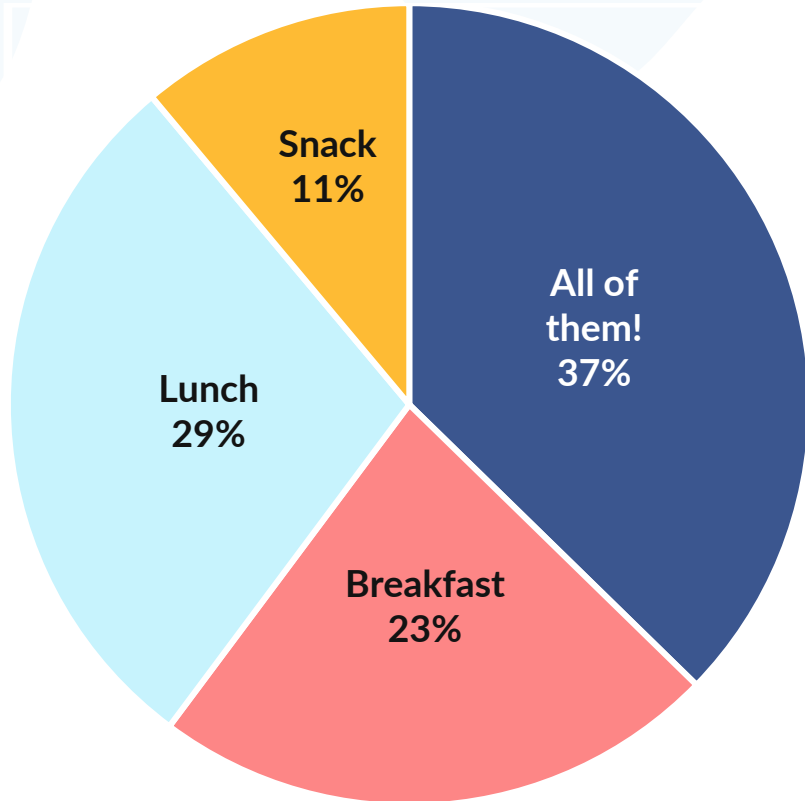
Almost half of the responding students indicated they are more likely to choose a school meal if smoothies are included.

- Close to another half of the students are sometimes more likely to choose a school meal if smoothies are included.
- One out of ten students say they are not influenced to buy a school meal if a smoothie is included.



Student Survey Results

At school, what is your favorite meal for smoothies?



Over one-third of the responding students say ALL MEALS are their favorite time for a smoothie.

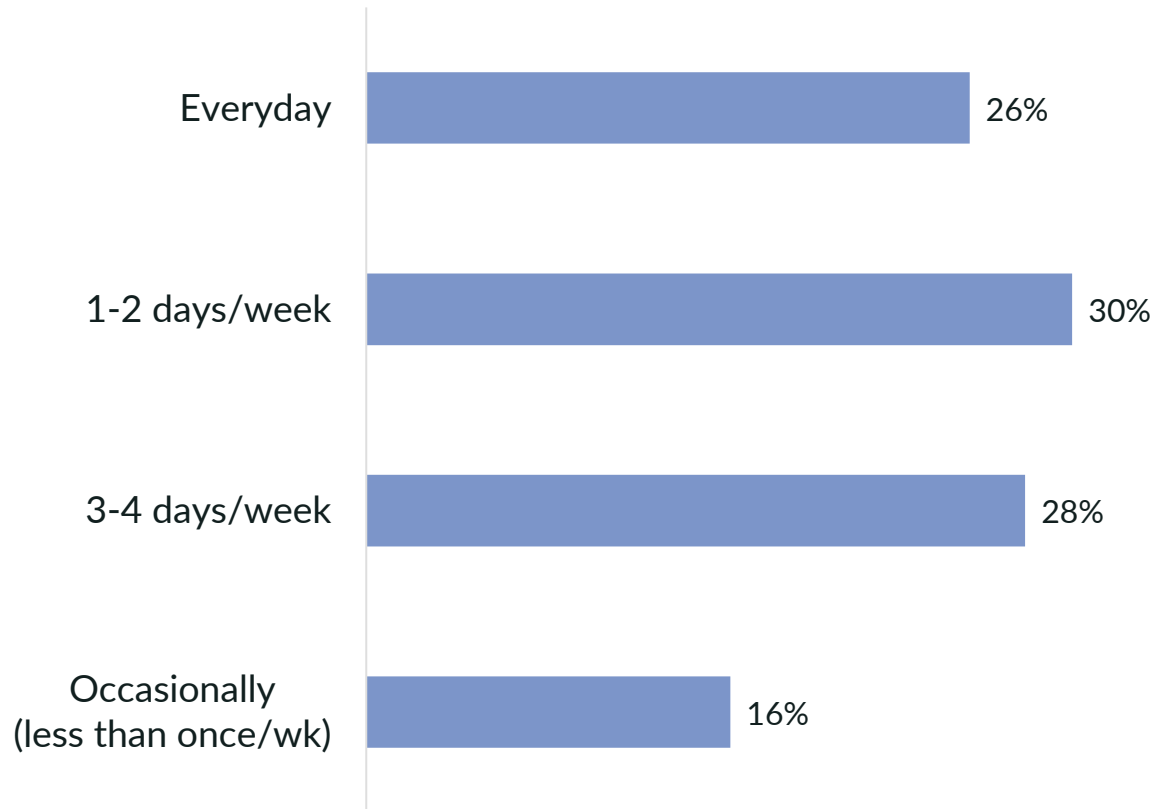
- Lunch, as opposed to breakfast, is slightly favored by students as their favorite meal for smoothies.
- Snacks are not as much of a favorite time for smoothies as breakfast or lunch are.

N=2,525



Student Survey Results

If smoothies were offered every day, how often would you choose to have a smoothie at school?



N=2,524

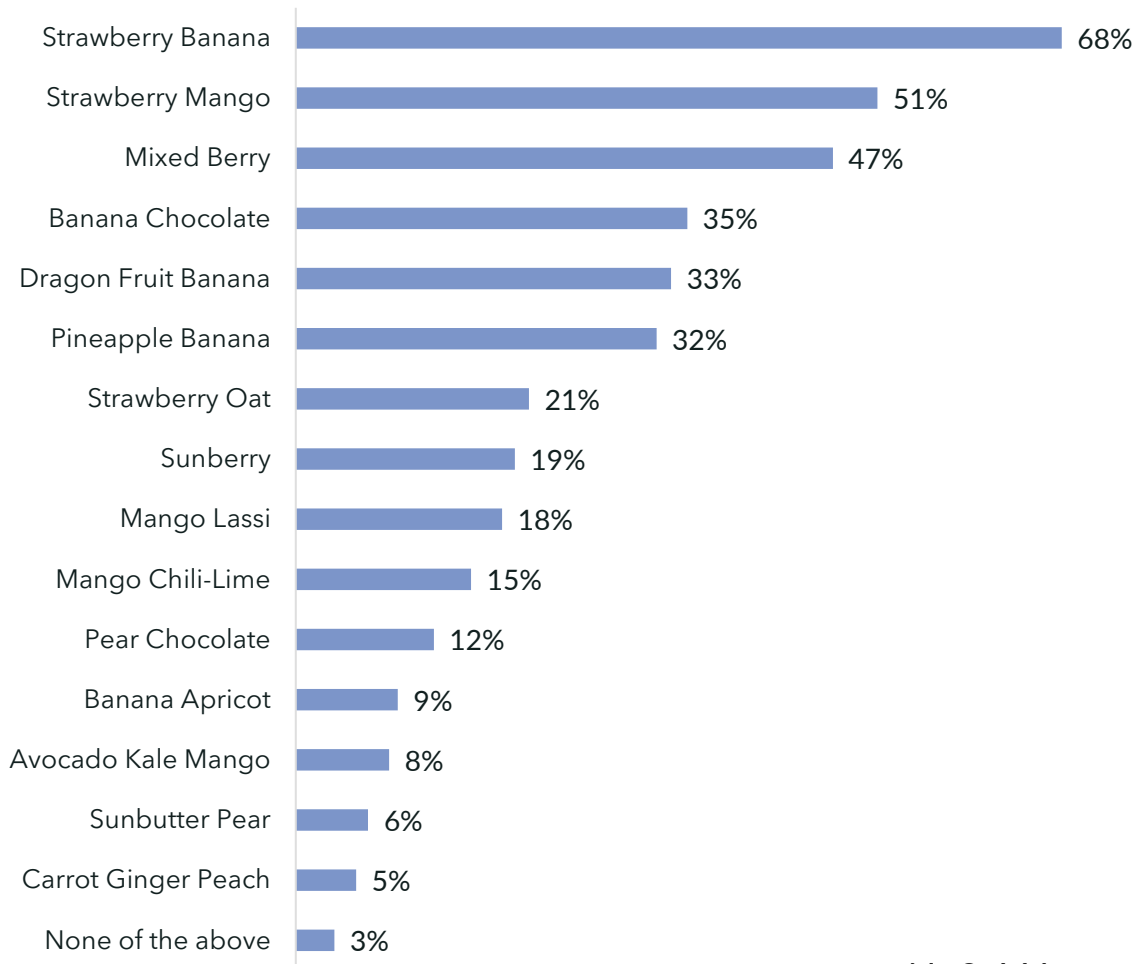
One quarter of the students would have a smoothie every day, if they were available daily

Student responses were fairly evenly split between choosing to have a smoothie daily, 1-2 times/week and 3-4 times/week.



Student Survey Results

What smoothie flavors do you like best? (Check all that apply)



N=2,441

TOP 3 FLAVORS



- Students prefer more traditional flavored smoothies over the more exotic flavors.
- Smoothies with bananas included tend to be more preferred flavors.



If you could make your own smoothie flavor, what would it be?

	Suggested Flavor	Count	% of All Responses
Classics	Apple	22	1%
	Banana	63	3%
	Banana +	37	2%
	Banana + strawberry or blueberry	185	9%
	Berry (general/mixed)	121	6%
	Blueberry	79	4%
	Cherry	31	2%
	Raspberry	63	3%
	Strawberry	170	8%
	W. Peanut butter/nuts	51	2%
Tropical	Kiwi +	96	5%
	Passion/dragonfruit	62	3%
	Peach/peach mango	68	3%
	W. Coconut	17	1%
	W. Pineapple/mango	345	17%
Dessert	Candy	12	1%
	Chocolate	121	6%
	Chocolate + Peanut butter	21	1%
	Chocolate banana	37	2%
	Chocolate berry	106	5%
	Chocolate berry banana	32	2%
	Ice cream	13	1%
	Oreo/cookie/cake	43	2%
	Vanilla	26	1%
Misc.	Acai	5	0%
	Avocado	7	0%
	Coffee	7	0%
	Green	11	1%
	Lemon/lime	38	2%
	Misc./mixture	135	7%
	W/ mint	16	1%
	Watermelon	42	2%

Students offered over 30 different smoothie flavors for making their own flavor.

The most common smoothie flavors suggested were:

- Pineapple Mango (345 suggested)
- Banana + Strawberry or Blueberry (185)
- Strawberry (170)
- Berry (General/mixed) (121)
- Chocolate (121)
- Chocolate Berry (106)



Meal Participation and Dairy Sales Results



Participation and Sales Results Data Collection

To measure the impact of the program on meal participation and volume of dairy in the schools, data was collected for October 2019 and November 2022.

- MMS collected breakfast and lunch Average Daily Participation (ADP) directly from 130 schools via an online form during the month of December 2022.
- Chartwells provided purchasing information for:
 - Bulk milk
 - Single serve 8oz. milk
 - Bulk yogurt
 - Single serve 4oz. yogurt





Executive Summary

Meal Participation

In the staff survey, half of the reporting schools felt the smoothie program increased overall meal participation.

- ADP data from participating schools supports that observation when compared to the national average from a similar timeframe.
- To account for variations in enrollment, ADP is converted from a count of participating students to the average % of enrolled students participating.

Participating Schools		Compared to SNA Survey* (Oct. 2021 vs. Oct. 2022)		Compared to All Chartwells schools (2019 vs. 2022)	
Meal Participation	% Change in ADP	SNA National % change in ADP*	Difference	All Chartwells Schools	Difference
Breakfast ADP	-7.8%	-10.8%	3%	-2.5%	-5.3%
Lunch ADP	6.3%	-5.7%	12%	-8.9%	15.2%

*According to a recent poll by School Nutrition Association, comparing October 2022 to October 2021



Executive Summary

Dairy Sales Results

Combining bulk and single serve, November 2022 over November 2019:

- Based on declining enrollment and meal participation, total meals in 2022 were down **-40,338** in November and **-681,120** annually vs 2019.

Sales Metric	Unit Size	Total Units Pre	Total Units Post	Incremental Units	% Change in Units	Annualized Incremental Units
Bulk Milk	8 oz.	2,768	18,352	15,584	563%	155,840
Single Serve Milk*#	8 oz.	599,945	594,054	-5,891	-1%	-58,910
Milk total 8 oz servings				9,693		96,930
Bulk Yogurt	4 oz.	56,192	88,088	31,896	57%	306,844
Single Serve Yogurt	4 oz.	60,316	69,572	9,256	15%	63,757
Yogurt total 4 oz servings				41,152		411,517

*The Prime Consulting All Channel report shows a 2.1% decline in milk volume from 2019 to 2021.

2.8% decline in enrollment in pilot schools = (2,512 students vs 2019)



Executive Summary

Annualized Milk Pounds

Smoothie Station Pilot drove incremental milk and yogurt sales and outperformed the national average for single serve milk.

In 130 participating schools:

- Enrollment was down **-2.8%**.
- Based on declining enrollment and meal participation, total meals in 2022 were down **-40,338** in November and **-681,120** annually vs 2019.

Sales Metric	Annualized Milk Pounds Pre	Annualized Milk Pounds Post	Annualized Incremental Milk Pounds
Bulk Milk	14,877	98,641	83,764
Single Serve Milk	3,224,704	3,193,040	-31,664
		Total from milk:	52,100
Bulk Yogurt	140,480	220,219	79,739
Single Serve Yogurt	150,790	173,930	23,140
		Total from yogurt:	102,879
		Overall Total:	154,979



Participation and Sales Results

Meal Participation by S/R

S/R	Pre Breakfast ADP	Post Breakfast ADP	Incremental Breakfast ADP	% Change Breakfast ADP	Pre Lunch ADP	Post Lunch ADP	Incremental Lunch ADP	% change Lunch ADP
Dairy Mgt. West	2,006	1,940	(66)	-3%	2,997	2,746	(251)	-8%
Dairy MAX	1,980	1,732	(248)	-13%	3,939	3,731	(208)	-5%
ADA Indiana	5,928	4,286	(1,642)	-28%	9,081	8,556	(525)	-6%
Maine †	52	192	140	269%	251	460	209	83%
Michigan	4,902	4,644	(257)	-5%	11,209	10,663	(546)	-5%
ADA Mideast	399	403	4	1%	949	1,059	110	12%
Midwest	3,022	2,930	(92)	-3%	9,307	10,161	854	9%
New England †	1,898	2,311	413	22%	3,214	4,748	1,534	48%
Washington	189	242	53	28%	950	1,132	182	19%
Total			(1,695)				1,359	

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.



Participation and Sales Results

Sales by S/R: Bulk Milk

S/R	School Count	Pre Total 8 oz Servings	Post Total 8 oz servings	Incremental 8 oz Servings	Pre Annualized Milk Pounds	Post Annualized Milk Pounds	Incremental Annualized Milk Pounds	% Change Breakfast ADP	% Change Lunch ADP
Dairy MAX	5	416	2,312	1,896	2,235	12,426	10,653	-13%	-5%
ADA Indiana	6	160	600	440	860	3,225	2,365	-28%	-6%
Maine[†]	1	64	128	64	344	688	344	269%**	83%**
UDIM	18	688	3,136	2,448	3,698	16,856	13,158	-5%	-5%
ADA Mideast*	2	-	144	144	-	774	774	1%	12%
Midwest	2	1,440	11,392	9,952	9,952	61,232	53,492	-3%	9%
New England* †	1	-	64	64	-	344	344	22%	48%
Washington* †	2	-	576	576	-	3,096	3,096	28%	19%
Total	37			15,584			83,764		

* Schools did not purchase bulk milk in October 2019.

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.

Note: Data was unavailable for schools participating from Dairy Management West and Wisconsin.



Participation and Sales Results

Sales by S/R: Single Serve Milk

S/R	School Count	Pre Total 8 oz Servings	Post Total 8 oz Servings	Incremental 8 oz Servings	Pre Annualized Milk Pounds	Post Annualized Milk Pounds	Incremental Annualized Milk Pounds	% Change Breakfast ADP	% Change Lunch ADP
Dairy Mgt. West	6	65,988	50,750	-15,238	356,685	272,781	-81,904	-3%	-8%
Dairy MAX	7	29,984	29,207	-777	161,164	156,988	-4,176	-13%	-5%
ADA Indiana	17	211,014	180,541	-30,473	1,134,200	970,408	-163,792	-28%	-6%
Maine †	1	805	354	-451	4,327	1,903	-2,424	269%	83%
UDIM	37	178,002	20,7067	29,065	956,761	1,112,985	156,224	-5%	-5%
ADA Midwest	2	10,900	15,400	4,500	58,588	82,775	24,188	1%	12%
Midwest	12	68,812	67,654	-1,158	369,864	363,640	-6,224	-3%	9%
New England †	6	20,890	26,931	6,041	112,284	144,754	32,470	22%	48%
Washington	4	13,550	16,150	2,600	72,831	86,806	13,975	28%	19%
Total	92			-5,891			(31,664)		

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.
 Note: Data was unavailable for the school participating from Wisconsin.



Participation and Sales Results

Sales by S/R: Bulk Yogurt

S/R	School Count	Pre Total 4 oz Servings	Post Total 4 oz servings	Incremental 4 oz Servings	Pre Annualized Milk Pounds	Post Annualized Milk Pounds	Incremental Annualized Milk Pounds	% Change Breakfast ADP	% Change Lunch ADP
Dairy Mgt. West	8	2,016	2,016	0	5,040	5,040	0	-3%	-8%
Dairy MAX	10	6,144	6,416	272	15,360	16,039	679	-13%	-5%
ADA Indiana	17	8,784	13,648	4,864	21,960	34,120	12,160	-28%	-6%
Maine †	1	368	2,112	1,744	920	5,280	4,360	269%	83%
Michigan	40	13,920	32,696	18,776	34,800	81,740	46,940	-5%	-5%
Mideast*	5	-	1,152	1,152	-	2,880	13,440	1%	12%
Midwest	29	7,392	12,768	5,376	18,480	31,920	13,943	-3%	9%
New England †	16	16,032	15,456	-576	40,080	38,640	-1,440	22%	48%
Washington	4	1,536	1,824	288	3,840	4,560	720	28%	19%
Total	130			31,896			79,739		

* Schools did not purchase bulk yogurt in October 2019.

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.

Note: Data was unavailable for the school participating from Wisconsin.



Participation and Sales Results

Sales by S/R: Single Serve Yogurt

S/R	School Count	Pre Total 4 oz Servings	Post Total 4 oz servings	Incremental 4 oz Servings	Pre Annualized Milk Pounds	Post Annualized Milk Pounds	Incremental Annualized Milk Pounds	% Change Breakfast ADP	% Change Lunch ADP
Dairy Mgt West	2	1,440	960	-480	3,600	2,400	-1,200	-3%	-8%
Dairy MAX	4	18,000	16,608	-1,392	45,000	41,520	-3,480	-13%	-5%
ADA Indiana	10	12,096	20,408	8,312	30,240	51,020	20,780	-28%	-6%
Michigan	27	10,396	11,052	656	25,990	27,630	1,640	-5%	-5%
Mideast	2	960	720	-240	2,400	1,800	-600	1%	12%
Midwest	7	4,752	5,952	1,200	11,880	14,880	3,000	-3%	9%
New England †	11	12,672	13,872	1,200	31,680	34,680	3,000	22%	48%
Total	63			9,256			23,140		

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.
Note: Data was unavailable for schools participating from Maine, Washington and Wisconsin.



Participation and Sales Results

Total Incremental Annualized Milk Pounds by S/R

S/R	Bulk Milk	Single Serve Milk	Bulk Yogurt	Single Serve Yogurt	Total
Dairy Mgt. West	- *	-81,904	0	-1,200	-83,104
Dairy MAX	10,191	-4,176	679	-3,480	3,214
Indiana	2,365	-163,792	12,160	20,780	-128,487
Maine †	344	-2,424	4,360	- *	2,280
Michigan	13,158	156,224	49,940	1,640	217,962
Mideast	774	24,188	2,880	-600	27,242
Midwest	53,492	-6,224	13,440	3,000	63,708
New England †	344	32,470	-1,440	3,000	34,374
Washington	3,096	13,975	720	- *	17,791
Total	83,764	-31,664	79,739	24,340	154,979

* No data reported.

† States that continued universal meals in the 2022-23 school year include Maine, Connecticut, Massachusetts, and Vermont.

Note: Data was unavailable for the school participating from Wisconsin.



Partnership Roles/Investments

- **DMI:**
- Smoothie Kits - \$268,542
- MMS Fees - \$50,000
- Total investment = \$318,542
- ROI: Breakeven = 1,538,850 milk lbs
 - Delivered = 3,725,231 milk lbs
 - Ratio = +2.4
- **Hubert:**
- Smoothie Kit Discount - \$99,570
- GY Grant Give-back-\$5,371
- Total = \$104,941
- Unboxing/Smoothie Prep equipment training video for schools



- **Chartwell's K-12:**
- Supplied pilot school list - **144**
- Delivered staff surveys to pilot schools
- Delivered Student surveys to pilot schools
- Corporate Marketing developed Smoothie Station Marketing Kits
- Corporate Marketing delivered Press Release to wire - **300** pick ups and over **209 million** impressions
- Corporate Chef collaboration with GM K-12 Chef to develop 30 new recipes using 2 oz milk and 4 oz yogurt for Smoothie Station Pilot
- Recipes added into Chartwell's menu system
- Food Buy manually pulled 2019 pre and 2022 test milk and yogurt data by school for the pilot
- Smoothie Training Guide for all Chartwell's K-12 schools including 5 training videos

- **General Mills:**
- Free case of yogurt for 144 schools - \$5,184
- 5 Rock the Bike Smoothie Bikes as prizes for schools to turn in Staff and Student Surveys- \$15,000
- Corporate Chef collaboration with GM K-12 Chef to develop 30 new recipes using 2 oz milk and 4 oz yogurt for Smoothie Station Pilot
- Use of General Mills Test Kitchen and Videographer for recipe development/ 5 training videos



Introduction to The Smoothie Station