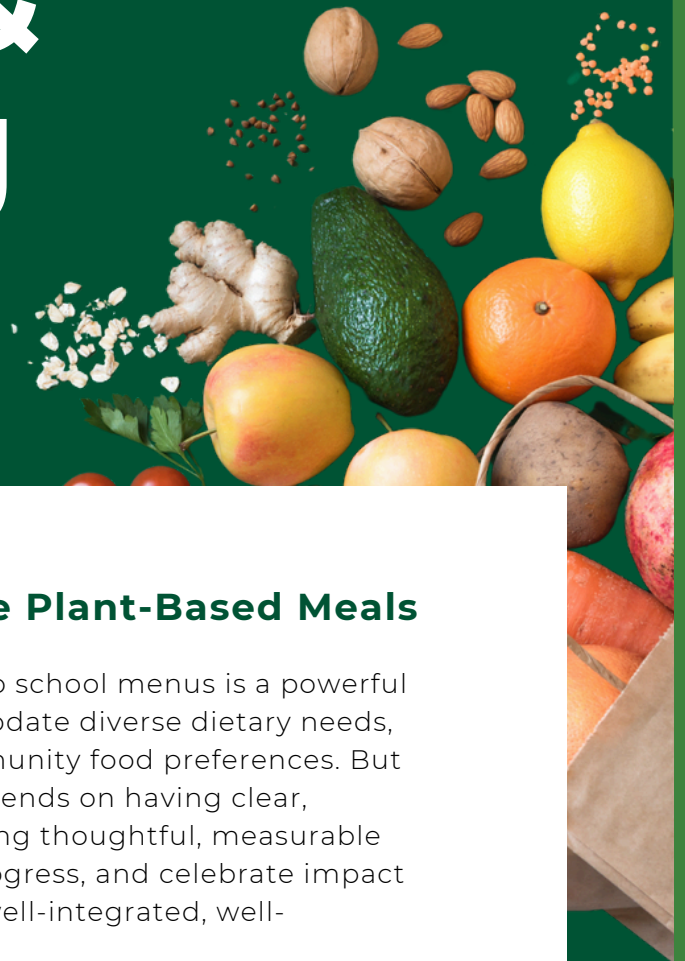


Goal Setting & Planning Workbook



Setting Goals to Incorporate Plant-Based Meals

Introducing more plant-based meals into school menus is a powerful way to support student health, accommodate diverse dietary needs, and align with evolving family and community food preferences. But like any meaningful change, success depends on having clear, realistic goals to guide the process. Setting thoughtful, measurable goals helps teams stay focused, track progress, and celebrate impact - while ensuring that new offerings are well-integrated, well-received, and sustainable over time.

-
- **Assess Your Starting Point**
 - **Set Meaningful & Achievable Goals**
 - **Align with Program Priorities**
 - **Identify Resources and Support**
 - **Monitor Progress and Adjust**
 - **Celebrate and Share Successes**

Step 1: Assess Your Starting Point

Before you set goals or add new menu items, it helps to take stock of what's already happening in your program. Use the prompts below to reflect on your current plant-based offerings and identify opportunities for growth.

Menu Review

Check all that apply:

- We currently offer fully plant-based entrée options
- These meals are served:
 - Daily
 - Weekly
 - Occasionally
 - Rarely
- We offer more than one type of plant-based protein
- We regularly serve whole grains (e.g., brown rice, whole grain pasta, quinoa)
- We feature a variety of fruits and vegetables
- Our plant-based meals are popular with students

What plant-based items do you currently serve?

(List all you can think of: entrées, sides, grab-and-go options)

What's working well with your current offerings?

(Taste, participation, prep ease, presentation, etc.)

Identify Gaps and Opportunities

Check any challenges you see in your current offerings:

- Limited variety (we repeat the same few meals)
- Few or no fully plant-based entrées
- Lack of plant-based protein options
- Minimal use of whole grains or legumes
- Low student participation in plant-based options
- Staff training or preparation challenges

Notes or examples of gaps or issues you've noticed:

Our program's current strengths

Our biggest opportunities for improvement:

Step 2: Set Meaningful & Achievable Goals

Now that you have a clear picture of where your program stands, it's time to set meaningful goals.

Start with Your Vision

What do you want to achieve by adding more plant-based meals to your menus?

(Choose all that apply or add your own)

- Support student health and wellbeing
- Provide more inclusive, culturally relevant options
- Improve participation in school meals
- Offer more allergy-friendly meals
- Reduce saturated fat, sodium, or processed foods
- Increase use of whole grains, legumes, and produce
- Align with district or wellness policy goals
- Other: _____

Write 1-3 Measurable Goals

(use these questions to guide additional goals)

What is your goal?

How will you measure success?

Is it realistic for your team and resources? (yes/no)

Why does this matter for your school community?

When will you achieve it? (set a date or timeframe)

Example Goals

For additional goal ideas, review Goal Setting Pages in the Pre-Launch Information & Resources

- Add one new plant-based entrée per week starting in October.
- Increase student participation in plant-based meals by 10% by winter break
- Host at least two plant-based taste tests, with 75% of responding students giving the featured item a thumbs up.
- Feature a legume-based protein on the menu at least once per week by the end of the semester.
- Replace two high-sodium animal-based meals with lower-sodium plant-based options by January.

Step 3: Align with Program Priorities

To make your plant-based goals stick, it helps to connect them to your school or district's broader priorities - whether that's nutrition, cultural inclusion, sustainability, cost-efficiency, increasing participation in your program, or meeting federal guidelines. This alignment builds support, strengthens your case, and keeps your efforts focused and strategic.

Which Priorities Matter Most in Your Program?

Check any priorities that apply to your school or district's food service goals:

- Meet USDA meal pattern requirements
- Improve student health outcomes
- Reduce sodium, saturated fat, or added sugars
- Align with local wellness policy
- Address food allergies or dietary restrictions
- Offer more inclusive and culturally relevant options
- Increase student satisfaction and participation
- Improve student focus, academic performance, or behavior
- Reduce food waste or environmental impact
- Improve kitchen workflow or staffing efficiency
- Stretch food dollars and reduce reliance on costly ingredients
- Develop nutrition team knowledge and skills
- Become a K-12 food service leader/expert/exemplar institution
- Other: _____

_____ (goal headline) aligns with our priorities by... (repeat for all goals)

_____ (goal headline) aligns with our priorities by... (repeat for all goals)

_____ (goal headline) aligns with our priorities by... (repeat for all goals)

Talking Points for Stakeholders

Building buy-in with your stakeholders begins with sharing your goals and connecting these plant-based efforts to what they already care about. Use the prompts below to begin thinking about how you can invest them in the process:

For Cafeteria Staff

- How will plant-based options improve workflow or meal prep?
- Will these recipes be easy to learn and execute with current equipment?
- Are there fewer allergens or handling risks with certain ingredients?
- Could plant-based options reduce food waste or leftovers?
- How will staff be supported with training, recipes, or tools?

For Students

- What new flavors or familiar foods can you offer that students will be excited about?
- How do these meals reflect students' cultures, preferences, or dietary needs?
- Can plant-based meals be offered in a fun, engaging way (e.g., taste tests or student picks)?
- Are you giving students more choice and voice in what's served?

For Educators in the School

- How do these meals align with school wellness goals?
- What benefits do plant-based options have for student focus, energy, and performance?
- Are there opportunities to tie menu changes into classroom learning (e.g., science, health, cultural studies)?
- How can teachers help promote or support these changes?

For Administrators and District Leaders

- How does this support USDA nutrition standards and compliance?
- Could these efforts help the district meet sustainability or equity goals?
- Will plant-based meals help improve student participation or reduce food costs?
- Are you piloting something that could serve as a model for other schools?

For Families and Caregivers

- How do plant-based options support their child's health and dietary needs?
- Are these meals familiar, appealing, and well-balanced?
- Will plant-based options provide more choices for vegetarian, vegan, or allergy-sensitive households?
- How can families offer feedback or be involved in the process?



Step 4: Identify Resources and Support

Adding plant-based meals to your school menu doesn't have to mean starting from scratch. The right support - whether it's new recipes, staff training, or sourcing help - can make all the difference. Use this section to map out what you need and where you can find it.

What Resources Does Your Team Need?

Check all that apply, and add notes about specifics.

- Staff training on plant-based cooking or USDA compliance
- Recipes that are kid-friendly and reimbursable
- Procurement guidance for plant-based products
- Connections with vendors or distributors
- Kitchen equipment or tools
- Nutrition education materials for students
- Promotional tools (e.g., posters, taste test materials)
- Time or support to pilot and test recipes
- Translations or materials for multilingual families
- More tools and strategies to make plant-based choices easy and appealing to students
- Other: _____

Where Can You Get Support?

Jot down any internal and external support sources. (People or departments in your district who can help. External partners or programs like vendors, trainers, nonprofits, etc.)

Which support channels will be most helpful to you right now?

- 1:1 technical assistance
- Webinars or virtual trainings
- Sample menus and recipes
- Cohort peer learning and idea sharing
- Site visits or demo days
- Other: _____

Create an inventory of resources or tools you might need	Have it	Need it	Who can help?
Plant-based USDA-compliant recipes	<input type="checkbox"/>	<input type="checkbox"/>	
Staff training on new menu prep	<input type="checkbox"/>	<input type="checkbox"/>	
Approved vendors/product lists	<input type="checkbox"/>	<input type="checkbox"/>	
Promotional or signage materials	<input type="checkbox"/>	<input type="checkbox"/>	
Student feedback or survey tools	<input type="checkbox"/>	<input type="checkbox"/>	

Step 5: Monitor Progress

Tracking your progress isn't just something you do at the end - it starts with a plan. This step is about identifying what you want to track and how you'll collect that information as your plant-based meals roll out. Taking a little time now to set up a system will make it easier to measure success, spot challenges early, and adjust as needed.

What Will You Track?

What indicators will help you know if your goals are working?

- Student participation in plant-based meals
- Student satisfaction or taste test results
- Plate waste or leftovers
- Staff preparation time or ease
- Cost or changes in food purchasing
- USDA compliance or meal pattern alignment
- Feedback from families or caregivers
- Staff comfort and confidence with new items
- Other: _____

What 1-2 items are your top tracking priorities right now?

1. _____
2. _____

How will you track progress?

Think ahead about the tools, time, and people you'll need. Pick methods that feel realistic for your team.

Methods to consider:

- Short surveys (paper or digital)
- Cafeteria observation sheets
- Taste test ballots
- Prep or production records
- Staff check-ins or feedback logs
- POS (point-of-sale) data analysis
- Photos or documentation of meals
- Other: _____

Who will help track, record, or report on progress?

- Food service manager
- Line staff or prep cooks
- Nutrition services director
- Students (via taste tests or clubs)
- Wellness committee
- Other: _____

For each tracking item above, how will you gather the info?

What We're Tracking	How We'll Track It	How Often?
Example: Student participation	POS reports and observation	Weekly

Step 6: Plan to Celebrate and Share Success

Celebrating success isn't just for the end - it's something you can build into your process from the start. Planning ahead to recognize wins - big and small - helps keep your team energized, builds buy-in, and reminds your community why this work matters. Use this section to think about how you'll track wins, recognize your team, and share your progress with others.

What Will You Celebrate?

Think about the milestones you want to recognize. *Check all that apply:*

- First plant-based entrée added to the menu
- Positive student feedback or participation increase
- Successful taste test or student-led event
- Staff mastering a new recipe or prep method
- Plate waste reduction or smoother operations
- Parent or caregiver appreciation
- Menu alignment with wellness, sustainability, or allergy goals
- Other: _____

Plan a few key moments to pause and reflect:

Milestone or Event	How We'll Celebrate or Acknowledge It	When
Example: First new plant-based meal	Shout-out in staff meeting, student photo	October lunch

Who Will You Recognize?

- Kitchen staff
- Food service manager
- Students who gave feedback
- Teachers or classroom partners
- Families who offered support
- Wellness or leadership teams
- Community partners or vendors
- Other: _____

How will you thank or acknowledge them?

- Verbal thank-you or team meeting shout-out
- Social media post or newsletter feature
- Small celebration (e.g., staff coffee, bulletin board)
- Student thank-you notes or drawings
- Recognition in district or school leadership updates
- Other: _____

How Will You Share Your Successes?

Celebrating publicly helps others learn from your work and builds support.

- Before/after photos of menu items
- Testimonials or quotes from students/staff
- Participation or waste reduction data
- Updates in school or district newsletters
- Displays in the cafeteria or front office
- Posts on school social media
- Presentations to leadership or the wellness committee
- Other: _____

More Plants
on Plates!

The text "More Plants on Plates!" is written in a white, handwritten-style font. The word "More" is on the top line, "Plants" is on the second line, "on" is on the third line, and "Plates!" is on the fourth line. The text is surrounded by several white line-art icons: a strawberry is positioned above the 'e' in "More"; two leaves are positioned above the 't' in "Plants"; an apple is positioned to the left of the 'o' in "on"; and a kiwi fruit is positioned to the right of the 'e' in "Plates!".