



Education Catering: Trend analysis 2017/18

This briefing provides details on the performance information available from APSE's performance networks service looking at performance indicators and current policy issues for councils who deliver education catering services.

Key issues

- The combined UK average all meal uptake in Primary and Special Schools has shown a marked improvement over the past 5 years. However, there has been a marginal decline over the last two years, consistent with the longer-term trend in Wales.
- The UK average productivity has marginally increased and stands at 9.15 meals served per staff hour.
- Average food cost per lunchtime meal (primary and special schools) stands at 80 pence.

Overview

The APSE performance networks programme for education catering provides performance indicators for price, service uptake, key cost indicators, productivity and qualitative measures for the service throughout the UK. Further, the programme continues to capture a significant amount of management data to support more detailed 'process benchmarking' of the service including its contribution to child health promotion and sustainability.

This executive summary aims to provide participating authorities with a picture of what the service trends are, what this infers and what further activity and analysis individual authorities and their benchmarking groups could consider. In this respect, it serves as a 'high level' guide only to highlight key challenges facing the service and may provide a strategic overview for those wishing

to 'drill down' into the drivers, policies and processes which affect their group or individual service and financial outcomes.

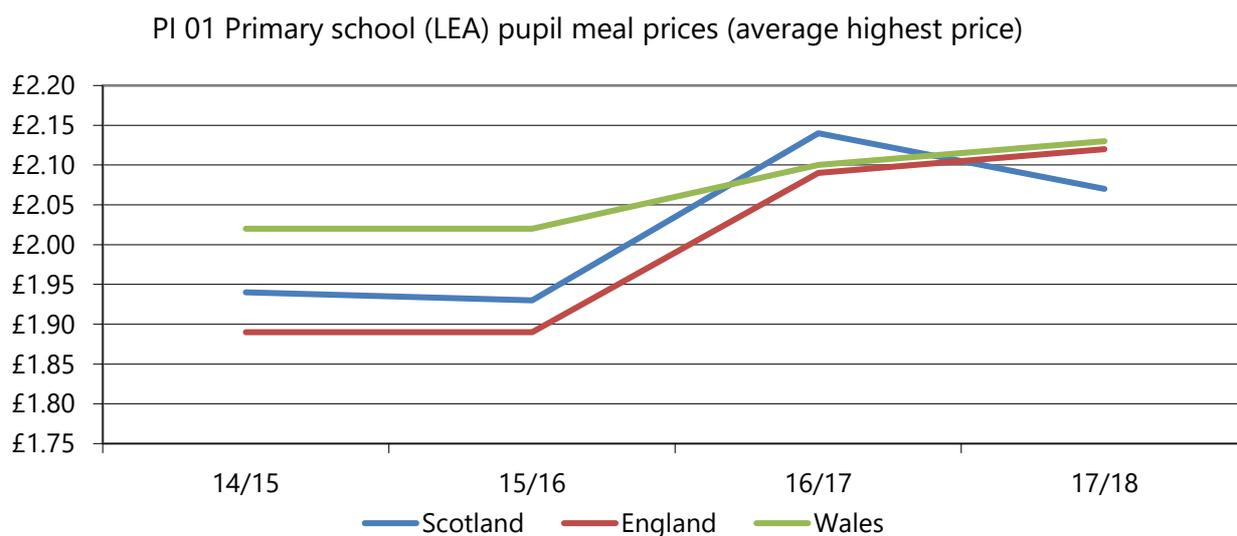
Trend analysis

The trend analysis is based on 'service wide averages' across all family groups and within each country for the past 5 years.

Meal charges

Analysis of the data for the prices for primary school meal (LEA) pupil meals (average highest price) (PI 01) show that the prices for England and Wales are now comparable with the highest average in Wales being reported as £2.13 an increase of £0.11 from 2015/16, and in England the reported highest average is £2.12 an increase of £0.23 from 2015/16.

However, the primary school (LEA) pupil meal price (average highest) in Scotland shows a decrease to £2.07 from the high in 2016/17 of £2.14.

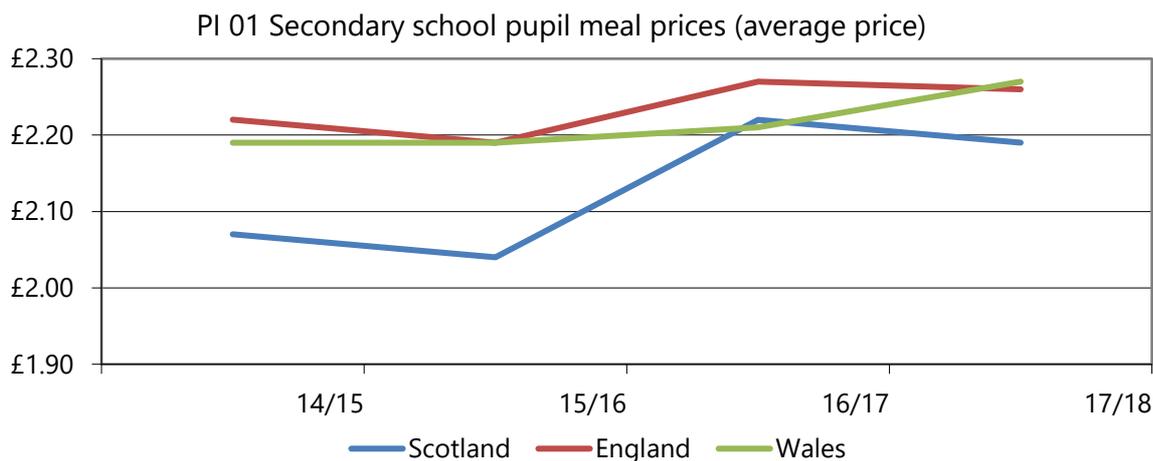


The overall trend in the data for secondary school pupil meal prices (average price) has shown an increase across the UK countries from the prices reported in 2015/16. Although the overall prices represent an increase from two years ago the prices in England and Scotland remain static from last year with the average price in England decreasing by £0.01 to £2.26 for 2017/18 and a decrease of £0.03 to £2.19 for 2017/18 in Scotland

The average price in Wales has shown a gradual increase over the 4-year trend analysis, the secondary school pupil meal prices for 2015/16 was reported at £2.19, which increased to £2.21 in 2016/17 and by a further £0.06 to £2.27 in 2017/18.

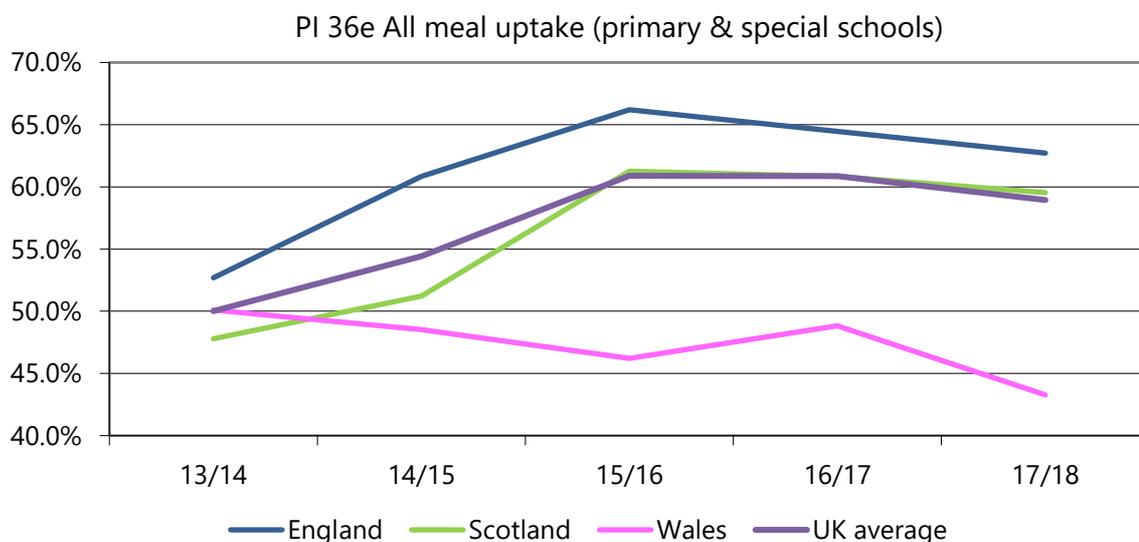
It should be noted that although the trend from 2014/15 is for an overall increase, these rises are still relatively low when compared with the increases in food and wage costs in the sector over this period. Local authorities have been able to keep price increases to a minimum by revising the way

that they provide the service, for example, revising menus to use more local seasonal products and introducing meat free days.



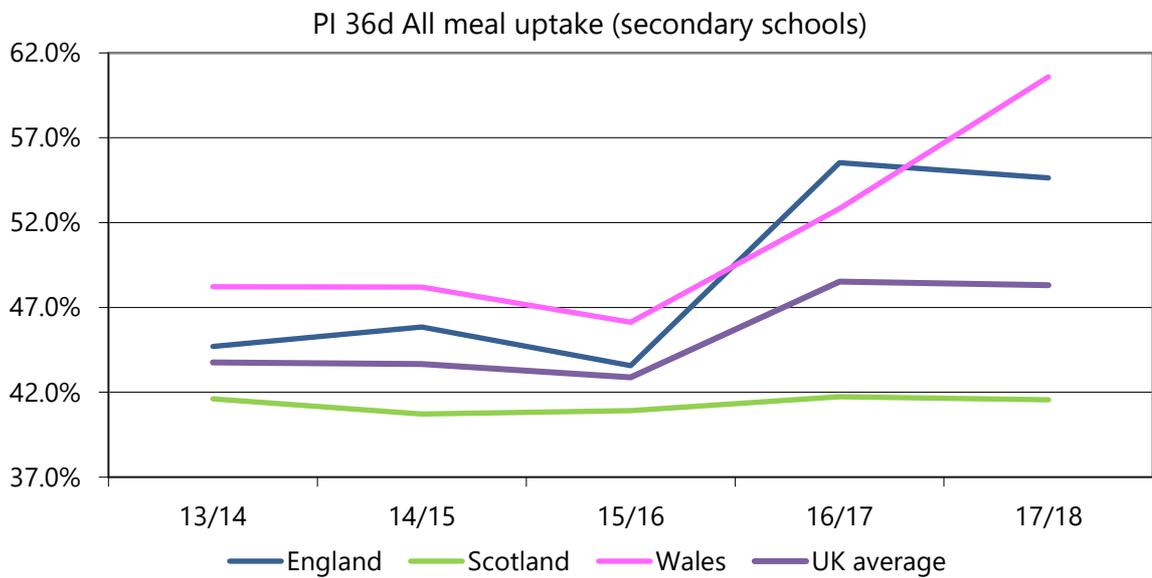
Service uptakes

The combined all meal uptake in Primary and Special Schools has shown a marked improvement over the past 5 years (which can be attributed to the introduction of Universal Infant Free School Meals (UIFSM) in Scotland and England) However, there has been a marginal decline over the last two years, consistent with the longer-term trend in Wales, where the focus remains on the provision of free breakfasts.



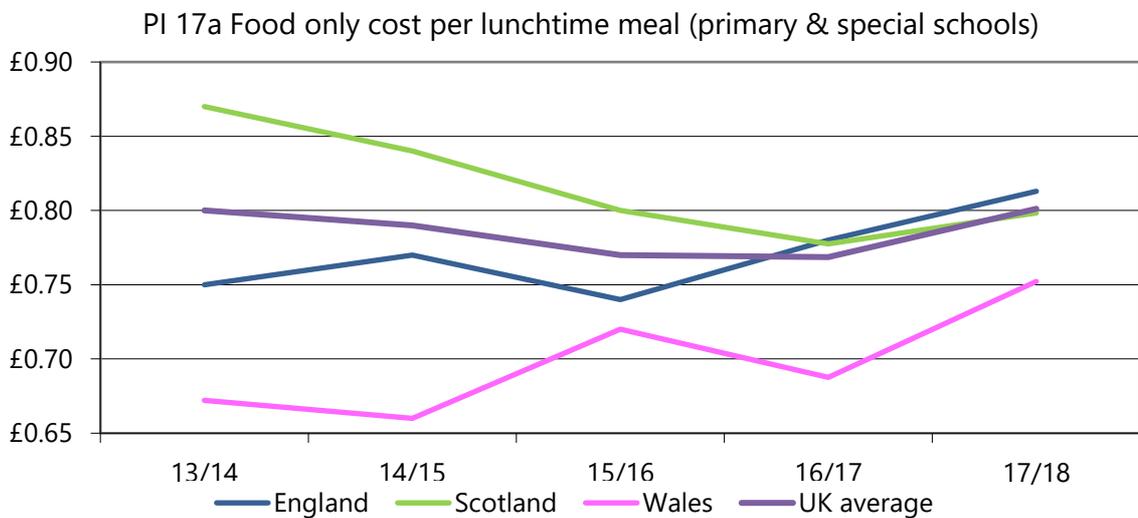
In the secondary sector, Wales continues to show a trend of improvement in PI 36d all meal uptake from the low of 46.13% reported in 2015/16 to 60.59% in 2017/18. Both England and Scotland remain consistent with the previous year, with the data showing a very marginal reduction of 0.89% in England and 0.18% in Scotland.

There has been little movement in either free or paid meal uptakes over the 5 years to 2017/18 in Scotland with the all meal uptake remaining at circa 42.0%, which may reflect a wide range of historical factors including a different approach to nutrition and school funding arrangements.

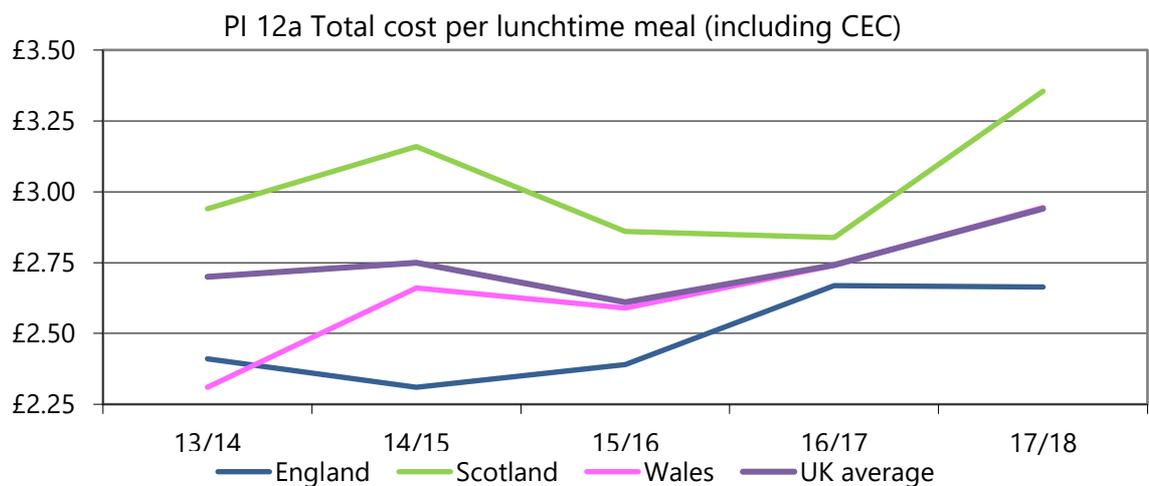
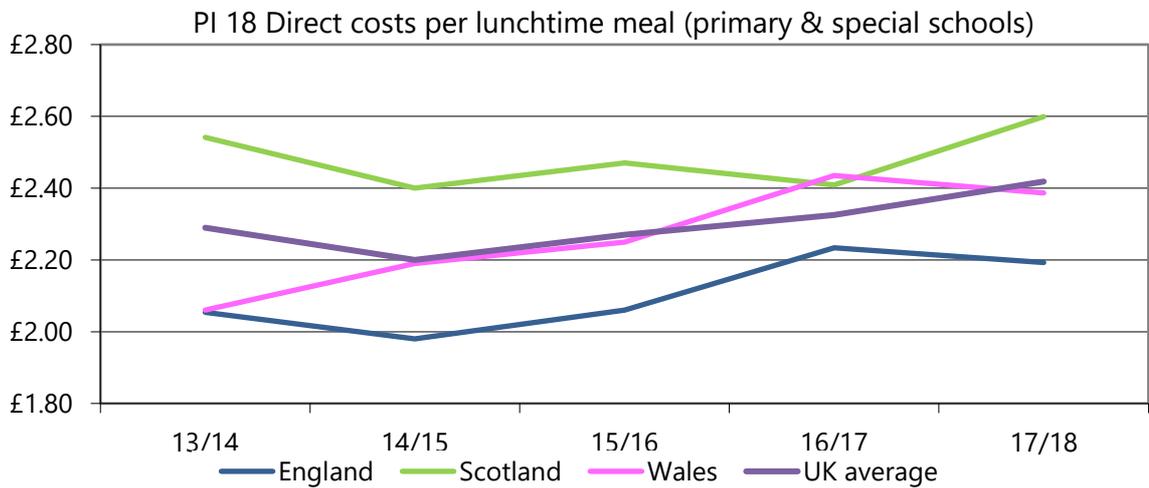


Key cost indicators

After a marked variance across the UK in food only cost per meal in the primary and special school sectors for 2013/14, the data for the last five years has seen a convergence in food costs across the countries with the UK average now within 5p for only the second time in the last 5 years. The trend analysis for 2016/17 and 2017/18 highlights that there has been an increase in the cost of food for a primary and special school lunchtime meal which may be in part due the fluctuation in the pound experienced following the Brexit referendum.

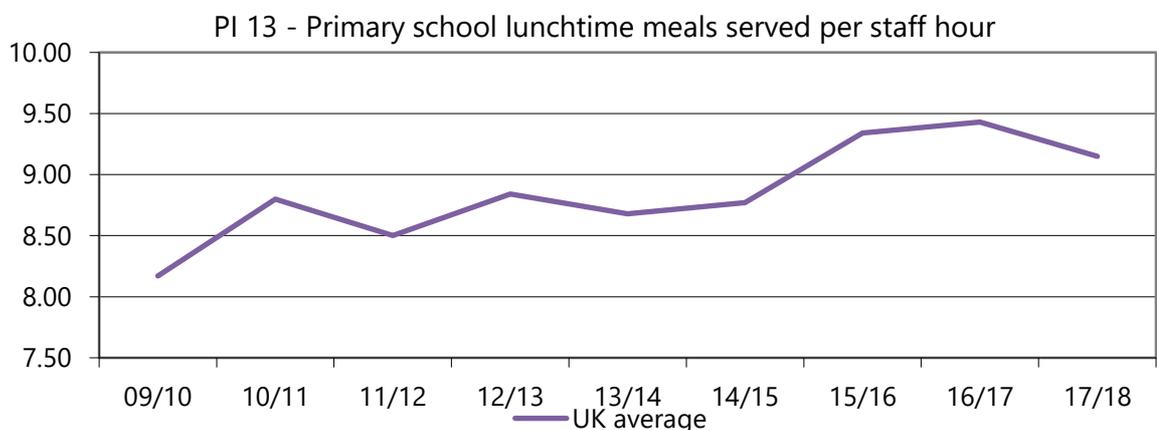


Given the convergence in food costs reported above, the impact of any movement in meal uptakes on the labour element of 'direct' (and other) 'cost per meal' indicators, is evident in the graphs below.

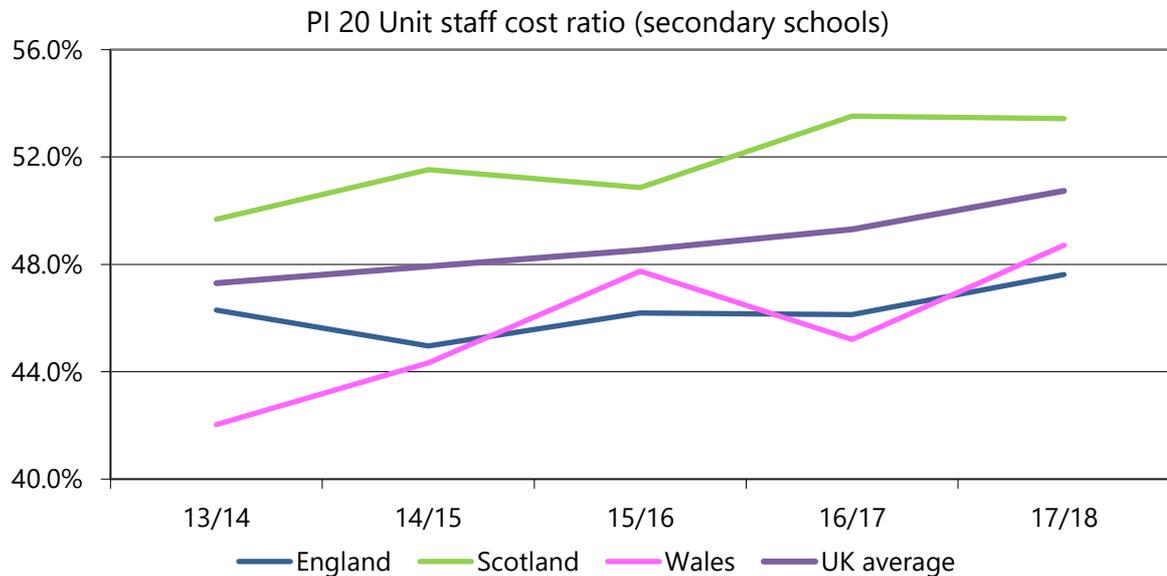


Productivity

The following graph highlights the link between productivity and meal uptakes. An analysis of the trend data for PI 13 Primary school lunchtime meals served per staff hour shows that over the past 9 years productivity has increased by circa one meal to 9.15 per staff hour. For 2017/18 the data shows a slight decrease in productivity which may indicate that productivity levels are now levelling off and this could suggest that the positive effect of UIFSM in the primary sector (including school and governmental focus on its benefits) has peaked, making the maintenance of the long-term trend in productivity improvement a challenge for school service providers.



The data for the unit staff costs ratio has seen a rise in the UK average for 2016/17 with Wales showing the largest increase of 3.5%, whereas England remains consistent with the previous year. The increase in the Unit staff cost ratio across the UK directly correlates with the introduction in April 2016 of the National Living Wage.



Nutrition and healthy eating

There has been no marked change in the number of staff trained in food nutrition across the UK, the percentage of all staff being reported at circa 70% for the last two years.

The reported number of schools offering a breakfast service (as a percentage of all schools) has returned to circa 14% in England and remained consistent with 2016/17 in Scotland and Wales. The average for each country is shown in the following 5-year table.

	England	Scotland	Wales
2013/14	14.1%	32.8%	60.1%
2014/15	14.8%	25.8%	68.5%
2015/16	14.3%	26.9%	70.6%
2016/17	11.0%	20.1%	64.7%
2017/18	14.6%	20.7%	64.1%
Average charge for breakfast service	62p	75p	N/A

Interpretation of data

This trend analysis collects and report on the 'average' outcomes across a range of key performance indicators, to inform national and 'country' trends in this service. Indeed, the 'country' data above highlights historic and ongoing factors which are in part affected by the different legal frameworks, policies and funding arrangements established by each country across the UK.

There can however be little doubt that meal uptakes remain the key driver on productivity and cost outcomes in this service as a whole and that the introduction of Universal Infant Free School Meals (UIFSM) in Scotland and England, has had the largest single impact on this service over the last 5 years. There are however early signs that it's positive effect in the primary sector (including school and governmental focus on its benefits) has peaked, making maintenance of the long-term trend in productivity improvement, a challenge for school service providers.

On the basis of returns made by Authorities in Wales this year, the percentage of schools offering statutory breakfast services remains directly in line with 2016/17 which, at 64%, is lower than in the previous two years and, in the absence of UIFSM, the uptake of Primary lunchtime meals continues the long-term trend of decline. Wales has however, maintained its uptake growth and performance outcomes in Secondary schools, being the only country of the UK that reports a unit (meal) cost lower than that in the Primary sector.

Individual authorities will no doubt have identified a wide range of reasons for any change in their own performance outcomes but understanding how comparative data can be used to inform improvement is at the heart of the Performance Networks programme.

In addition to the key and other performance indicators reported by the programme, the collection of a significant range of 'profile data' is designed to support the rationalisation of cost and other outcomes and enable effective 'process benchmarking' between local authority providers across the UK.

In the context of this trend analysis, we have for the second year, drawn together a small range of 'profile data' (reflected in the table below) which may have some bearing on the country variations evident above and inform the effect of operating conditions and country policies on performance outcomes.

In each case, the averages and stats reported in this table exclude any 'zero' returns (unless confirmed as valid by the authority) and are therefore a true representation of the data collected for 2017/18 and cover a total of 3,279 schools across the UK.

Key profile data	England	Scotland	Wales
Average school roll	287	252	244
Percentage of free meal entitlement (including UIFSM in England & Scotland)	46.3%	37.2%	17.09%
Percentage of Primary Schools with integrated Nursery provision	7.7%	10.7%	No data
Percentage of Primary Schools that are 'Dining Centres' (No on-site production)	10.1%	28.0%	3.8%

Key profile data	England	Scotland	Wales
Percentage of schools holding FFL (or other 'Healthy Eating' award)	92%	87%	0%
Percentage of providers responsible for more than Education Catering (i.e. other 'FM' services)	19%	71%	33%

When measured against the uptake, productivity and cost outcomes above, it is reasonable to assume that a number of these stats may contribute to the variation in country outcomes and that the same (and other 'profile' data) could equally be used to measure variations between individual or groups of authorities as part of an effective approach to 'process benchmarking'.

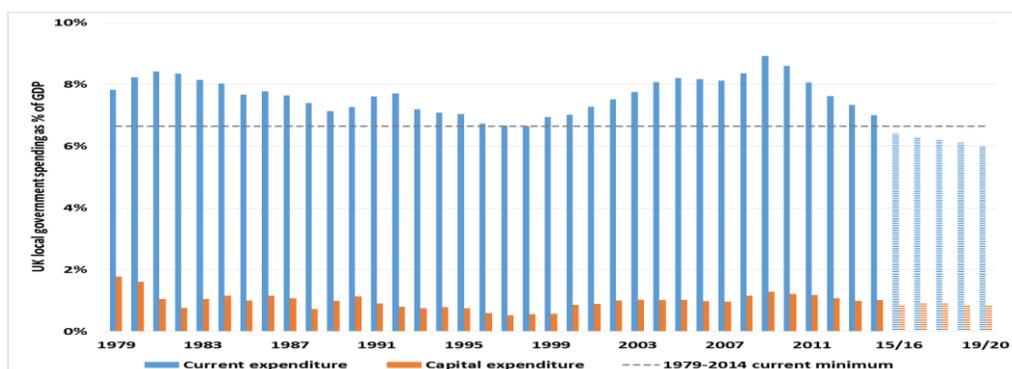
In this respect, APSE will continue to develop and reflect country and UK targets and update the PIs and supporting profile data sets which enable subscribers to 'drill down' into factors that affect evident variances in performance and support effective 'process benchmarking' to drive continuous improvement in this service.

Future focus

The data continues to show a direct correlation between changes in government policy and school meal provision. There is a continued uncertainty in the sector regarding the impact of Brexit on food costs and staffing and the effect on free school meals uptake from the changes and continued roll out of Universal Credit. APSE's Performance Network benchmarking data will continue to allow trends to be measured and will provide an analysis of any impact on the service

Local government is facing uncharted waters in terms of Local Government Finance. By 2020 overall UK spend on Local Government will be 30% less than in 2010 and will be smaller than at any point in over 70 years, since 1948.

UK local government spending as a share of GDP: current spending, already below the 1979-2014 minimum, is projected to go on falling to 2020.



Sources: Office for National Statistics to 2014. ; Office for Budget Responsibility *Economy and Fiscal Supplementary Tables* (tables 1.2 and 2.35)

Performance management is increasingly being used by public service providers as a mechanism to withstand austerity and demonstrate value for money to a range of internal and external stakeholders. As W. Edwards Deming stated:

“Without data, you’re just another person with an opinion.”

Despite measuring and improving performance being critical to managing services effectively and for accountability purposes, the need for this has never been greater in order to know your own service and to be able to identify achievable cost savings and innovative approaches to service delivery. Otherwise, how do you know you are delivering what you want to deliver?

Information and data provides intelligence on how effective any service change is, to establish a starting point and to identify future targets. Performance measurement is also a mechanism to learn how other local authorities are meeting the challenges and the impact that their service changes is making in terms of cost, quality, productivity and customer satisfaction levels.

In this respect, APSE will continue to develop and reflect country and UK targets and update the PIs and supporting profile data sets which enable subscribers to ‘drill down’ into factors that affect evident variances in performance and support effective ‘process benchmarking’ to drive continuous improvement in this service.

The issues raised in this briefing will also provide topics for discussion at the forthcoming **APSE Facilities, Cleaning and Catering Management Seminar** which will be held in Nottingham on Thursday 24 and 25 January 2019. [For further details and to book your place - click here](#)

Vickie Hacking

APSE Principal Advisor

John Bedwell

APSE Associate