

Creating Healthy Concessions: A RESOURCE GUIDE





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Executive Director Kathryn Ott Lovell Parks are an important resource for communities and families alike. The Fairmount Park Conservancy recognizes the importance of healthy spaces and, along with our partners, launched a Healthy Food Concession Initiative to create a blueprint for park concessions that 1) maximizes community and youth engagement, 2) sells healthy affordable food to community residents and 3) creates a model upon which similar initiatives can build.

This guidebook is designed to be a resource for community groups, local and state officials, nonprofit organizations and other partner agencies interested in bringing healthy food resources to their communities, improving their local parks and building community capacity. It is our hope that the guidebook provides a roadmap for other park systems as they establish new concession operations or re-imagine existing operations.

Several sources of information inform this guidebook. A national scan of projects and standards provided an important foundation for the work. Aspects related to business planning and local engagement were developed with The Enterprise Center and are based in Hunting Park, PA, an 87-acre urban park, which is part of the 10,200-acre Philadelphia Parks & Recreation system. In addition, strategies developed at the Princeton Recreation Department located in Princeton, NJ have also informed our efforts through partnerships with The Food Trust.

As the nonprofit organization dedicated to leading and supporting efforts which preserve and improve Philadelphia's park system, the Fairmount Park Conservancy is thrilled to be a part of this project which is not only creating a safer and more inviting park, but is directly contributing to a healthier and vibrant community. We eagerly anticipate implementing this initiative with other communities at other park sites throughout the Philadelphia Parks & Recreation system and continuing to share the outcomes with other cities.

And thank you to our partners, who have brought a wealth of knowledge and unwavering enthusiasm to this project: Hunting Park United, Philadelphia Parks & Recreation, The Food Trust and The Enterprise Center.

Sincerely,

Kathryn Ott Lovell Executive Director

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BACKGROUND:

Why Healthy Concessions?

Concession stands are notoriously a place where families buy their "peanuts and cracker jacks" or a hot dog at the game. While often considered a matter of convenience, the reality is that concessions are wide-spread meal outlets upon which millions of families rely each year. According to the National Park Service (NPS), there are currently 397 national parks. These parks issue 500 concession contracts that gross over \$1 billion annually through sales of food and beverages to approximately 280 million visitors.1

At the local level concessions remain an important part of the landscape. Using a few major cities as examples, 122 concessions are anticipated in 2012 on Chicago Park District Property² while in New York City, approximately 500 concessions currently operate in parks throughout the five boroughs^{3, 4}. In the Los Angeles County Department of Parks and Recreation there are nearly 150 parks selling food⁵.

Given the reach of these park concessions and the public nature of institutions that support the parks, many are beginning to investigate how concessions can offer healthier foods in order to better meet the health needs of residents.

Today, obesity is the second leading cause of death in America. One out of every three children is overweight or obese and 2 out of 3 adults are overweight or obese. In economic terms, we are spending \$190.2 billion each year to treat individuals suffering with obesity-related illnesses—that's 21 percent of medical spending in the US6.

The goal of this work is to increase access to nutritious foods while decreasing consumption of excess calories.

In light of this epidemic, parks and recreational facilities are beginning to re-think what foods, in what proportions and at what price points items are vended from these publicly supported facilities. The goal of this work is to increase access to nutritious foods while decreasing consumption of excess calories. The approach leaves the door open for profit—a key driver in any business—yet works to carefully weigh the price, placement, promotion and product paradigm to maximize health benefits.



PARTNERSHIPS:

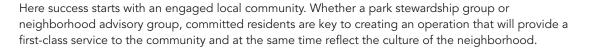
Who Should Be at the Table?

More than ever, we are seeing that collaborative partnerships, which draw experts and practitioners from a variety of sectors, are best able to solve our pressing social issues by bringing together critical resources and working directly with communities to ensure sustainable solutions.

The following partners are critical for success of a park-based healthy concession initiative:

- 1. Local community
- 2. Park owner or operator, typically government-affiliated
- 3. Public health nutrition expert
- 4. Small business planner, especially one with restaurant or concession expertise
- 5. Operator (where applicable)

In Philadelphia's Hunting Park, the Fairmount Park Conservancy and Philadelphia Parks & Recreation, in partnership with the local stewardship group Hunting Park United, convened thought leaders from local government and the private sector to create a plan for a concessions operation that would not only be financially successful but would also bring healthy and delicious food to park users while engaging local youth in the process.



Local government, including the park governing agency (state, city or municipality), must be on board with the policy changes that need to occur in order to support this type of endeavor. Philadelphia has an extensive public park system, which covers over 10,200 acres of the city and weaves its way through almost every neighborhood. The vision and leadership of Philadelphia Parks & Recreation Department has been instrumental in developing guidelines for the Request for Proposal (RFP) process and needs assessment strategies for healthy concessions. As the city department that is most engaged with the lives of residents and visitors on a daily basis, Philadelphia Parks & Recreation understands the direct impact that parks have on the health and vibrancy of a city and is a critical partner for the success of the work.

Regional leaders in healthy food policy and small business entrepreneurship will bring expertise that will allow for the creation of a robust plan that ensures healthy food offerings and supports local business entrepreneurship. Engaging economic development agencies such as The Enterprise Center in Philadelphia is also instrumental. Their capacity to actively engage with local businesses, residents and the community surrounding the park were key to an effective strategy. Such partners are important for maintaining a public health emphasis while at the same time developing a business model that is viable.



EVALUATION:

Assessing Potential for Healthy Vending and Measuring Impacts

As public health's interest in healthy concessions is emerging, so too are measurement best practices to determine the impacts of menu changes. Where access to register receipts or Point of Sale (POS) system data is possible, sales data is a key metric in the determination of baseline and sales thereafter.

In absence of such metrics, menu studies often provide substantive information about the nature of food environments such as concession stands. For example, a recent study of park food sales in the National Park System, conducted in partnership with the Centers for Disease Control and Prevention (CDC), utilized such methods. There they rated the nutrition environments of restaurants (defined broadly), snack shops and other concession vending and the quality and availability of free, plain drinking water. Restaurant assessments, which include concessions, captured data on the presence or absence of advertising or promotions at the venue (such as supersizing) as well as the availability of healthy entrees and sides. Specifically the assessment counted the number of dishes (total, healthy and vegetarian), number of salad options with nonfat dressing options, number of healthy sides (such as fruit), baked chips, availability of wheat bread, availability of french fries and other less-healthy vegetables (in sauce), desserts and beverages.



Garbology is another emerging technique for understanding food items currently consumed in the park. In simple terms, garbology is the scientific study of trash and the way it reflects the lifestyles of a group of people⁷. This approach catalogues specific categories of items consumed and can be particularly useful in parks where illegal vending is at play. In a survey of Hunting Park (Philadelphia, PA) park-goers, for example, 3 percent reported consuming alcohol in the park while garbology data found 43% of all the trash was alcohol related.

Resident surveys and traffic counters (devices that count the number of pedestrians or cars passing by) can yield important data about customer demand. Many park systems are already using traffic counters to track use of parks. These metrics, along with data about frequent major events (such as sports practices or games) support demand assessments for business planning purposes. Local franchise operators, for example, have communicated expectations for a 1% customer purchase rate based on information from car traffic counters. In our study of Hunting Park, we found approximately 6,700 cars enter the park each day. The concession stand is also located adjacent to a busy thoroughfare that runs through the center of the park, making the traffic information all the more relevant. Surveying residents and park users is also a way to spread the word about new concession operations.

GARBOLOGY: FROM TRASH TO TREASURE

Steps for Completion

Open trash bag over tarp (using scissors if necessary).

Use rake to spread garbage out over tarp.

Remove unnecessary garbage items (items irrelevant to project, i.e. non-food trash).

Begin to move remaining (relevant) garbage into groups (i.e. beverages, snacks/packaged food, hot/prepared foods).

Once items are grouped, record the item, brand name (if applicable), and quantity. Judgments may need to be inferred from location and season (i.e. popsicle-like sticks are most likely from chicken-on-the-stick sales).

Take photographs as needed.

Take image of trash for qualitative review to record counts, findings.

Supplies Needed

- 1. Large tarps (on which trash can be spread)
- 2. Work gloves, preferably puncture-proof
- 3. Grabbers (to pick up trash)
- 4. Scissors
- 5. Sturdy metal rake
- 6. Camera
- 7. Item record spreadsheet



MENUS:

What is Healthy Vending Anyway?

"Healthy" can be defined in many ways—often differently by different stakeholders. Our definition of "healthy vending" requires attention to each of the "4 P's"—product, pricing, promotion and placement.

Healthy Product Criteria

Currently there are several resources available for determining product criteria for healthy vending. Many links are provided in the resources section at the end of this document. States such as Delaware, and cities like Los Angeles, for example each have set standards for concession vending which are available online.

In addition, Health and Human Services (HHS) and the General Service Administration (GSA) recently issued "Health and Sustainability Guidelines for Federal Concessions and Vending Operations" which assist contractors in increasing healthy food and beverage choices and sustainable practices at federal worksites. For example, healthier choices include items such as seasonal vegetables and fruits, whole grain options, including pasta, vegetarian entrees, low-fat milk, yogurt and cottage cheese, and freely available drinking water. Supporting sustainable food service practices includes offering incentives for using reusable beverage containers, using compostable and bio-based trays, flatware, plates and bowls, and offering food that is organically, locally or sustainably grown and labeled accordingly.

The Center for Disease Control and National Park Service adopted the Nutrition Environment Measures Survey (NEMS) for use in national parks, which offers guidelines as part of its assessment protocol. For example, non-fried items without special sauces, fruits without added sugar, baked chips with less than 3 grams of fat, main dish salads with low-fat or non-fat dressing and without three or more high-fat toppings (cheese, bacon etc.) are all documented in a healthy category. Burgers and sandwiches meet the healthy criteria if they are under 650 calories with less than 30 percent of calories from fat and less than 10 percent from saturated fat. Unsweetened tea, water, diet beverages (under 10 calories per eight ounces), 100 percent juice in an 8-ounce serving or less and 1 percent or skim milk meet criteria for healthy beverages.

When operationalizing these recommendations, however, it's clear that the items must sell, and must be profitable for the concessionaire. Approaches to reducing calories while maintaining profitability should be considered. For example, shifting burgers to include smaller quantities of meat or fries from an eight-ounce portion to a four-ounce or six-ounce portion can result in significant calorie reductions. While these items might not meet healthy criteria per se, negotiations with vendors or operators may require a multi-faceted approach whereby new items are phased in, old items phased out and existing products re-portioned.





Healthy Pricing

Individual dietary choices are primarily influenced by such considerations as taste, cost, convenience and nutritional value of foods. One pricing strategy which shows promise in promoting healthier purchases is increasing the price of less healthy items while decreasing prices of more healthy items—generating a cost-neutral effect to the vendor. Making healthier items more affordable than the less healthy items is a complementary approach to improving healthy product availability. In Minnesota, two community-based intervention studies used price reductions to promote the increased purchase of targeted foods. The first study examined lower prices and point-of-purchase promotion on sales of lower-fat

Making healthier items more affordable than the less healthy items is a complementary approach to improving healthy product availability.

vending machine snacks in 12 work sites and 12 secondary schools. Price reductions of 10 percent, 25 percent and 50 percent on lower-fat snacks resulted in an increase in sales of 9 percent, 39 percent and 93 percent, respectively, compared with usual price conditions. The second study examined the impact of a 50 percent price reduction on fresh fruit and baby carrots in two secondary school cafeterias. Compared with usual price conditions, price reductions resulted in a four-fold increase in fresh fruit sales and a two-fold increase in baby carrot sales.⁹

Healthy Promotions

Promoting nutrition and healthful food items is necessary for increasing consumption of foods customers don't typically eat. Attractive packaging, signage like table tents that encourage customers to try specific healthier items such as a fruit salad and menu labeling that state "low fat" or calories of items are clear examples of healthy promotions. Using integrated marketing communications strategies, leading food, beverage and restaurant companies have created an environment to promote unhealthy foods, beverages and meals to children and adolescents. Along with these various forms of digital communication, other unhealthy promotions include signage that encourages desserts with meals, or "supersizing" your meal in order to feel like you're getting the best "bang for your buck". Healthy vendors can take a cue from other promotional strategies such as taste testing or flyers about new items can serve to orient families to new items and improve acceptance.

Healthy Placement

In order to influence customers to purchase healthy items, place them in front of the customers as frequently as possible, and where they are most likely to be seen. One report of an innovation in placement is the introduction of youth-designed "healthy checkout aisles" for a Wal-Mart store in California. Candy bars and chewing gum were replaced with raisins, nuts, pretzels, and granola bars. Results of The California Endowment's Healthy Eating, Active Communities (HEAC) Program showed that this strategy successfully changed children's food and physical activity environments. In addition, Wal-Mart sales for these items had doubled and in some cases tripled. Some other suggestions include positioning healthier options in plain view and placing less healthy options in less visible areas. In addition,

GROUNDWORK:

Business Planning

Basic business planning includes a review of anticipated startup costs, market demand analysis and a break-even analysis that anticipates revenue. In the case of Hunting Park, business planning included the following steps, which may not occur linearly:

- 1. Looking at the history of stand operations
- 2. Working alongside community and park system administrators to identify workable frameworks for stand operation (i.e. identify operator criteria and operational structure; model RFPs to select a concessionaire, etc.)
- 3. Assessing facility needs and upgrades
- 4. Listing potential menu items
- 5. Completing a competitive analysis including review of illegal vending, other food in the community and surveys of customer preferences and products consumed in the park

Many of the decisions and activities listed here are intertwined. For example, it is nearly impossible to decide equipment needs and costs without a menu and menus depend on operators. However, an operator may not be willing to come to the table if a concession stand is in extreme disrepair. In these instances it is important to make "best quess" estimations.

At right is an example of estimated startup costs for a partially operational stand—a 2,200 sq. ft. space that is in desperate need of upgrading and has not operated for 10 years—but that has some equipment that is in working order and a functional building shell. Splitting cost burden between the park and the operator may be a case by case decision.

Concession stand operations depend on a careful balance of product mix, profit margin and demand.

SAMPLE STARTUP COSTS FOR REOPENING A CONCESSION STAND

For Park System		
Kitchen Outfitting (i.e. refrigerators, microwave ovens, cash registers)	\$85,000	
Dining Area (i.e. outdoor seating, take-out/order counter, lighting fixtures)	\$5,000	
Installation (i.e. general contracting, flooring)	\$3,000	
Office (i.e. P.O.S.)	\$10,000	
Soft Costs (i.e. security system)	\$6,000	
10% Contingency (of total cost)	\$9,900	
Total	\$119,900	

For Operator	
Kitchen Outfitting (i.e. pots, pans, tools, utensils)	\$4,000
Small Wares (i.e. menus, table accessories)	\$1,500
Installation (i.e. signage, labor)	\$9,000
Office (i.e. computer, copy/fax machine, credit card system)	\$5,400
Soft Costs (i.e. rent, marketing, licensing, inventory, book keeping)	\$38,500
10% Contingency (of total cost)	\$4,340
Total	\$64,240

Revenue Expectations

Anticipating revenue is a challenge in any business, and healthy concessions are no exception. Where prior operational data is available, such information should be used as a starting point for expectations. In many instances, however, stands may not have been operated before, or the product mix will be vastly different as the model shifts to healthier offerings and prior operation figures may be less relevant. Below are some guiding thoughts for generating revenue expectations:

- 1. Demand is a percentage of the total estimated number of visitors for major events (like sports, practices, camps, pool, etc.) and for traffic passing through.
- 2. Average check per customer is the average amount of money each customer will pay when purchasing food from the concession stand.
- 3. Revenue is based on a function of demand and the average expected check per customer.

Breaking Even or Making a Profit: Points to Consider

Concession stand operations depend on a careful balance of product mix, profit margin and demand. These factors are often influenced by weather and seasonality, especially for parks. A rainy summer, for example, could mean the difference between a profitable stand and one that merely breaks even. Below are some additional factors to consider when weighing the profitability of a concession model.

- 1. Profit figures need to be adjusted for any income tax, depreciation and amortization costs.
- 2. Seasonal shifts in park goers may result in a need to operate only during peak season or limited hours.
- 3. Inclement weather in parks will likely limit customers. For instance, even during a busy summer season, poor weather will impact sales at concessions adjacent to pools and other recreational amenities.
- 4. Outside of the costs directly related to food products, staffing is the largest expense. With adult or youth volunteers, staffing costs can be substantially lowered. However, these volunteers may not be as reliable as full-time staff and ultimately impact days and times of operation.
- 5. A tenant with an entrepreneurial mind should be able to:
 - Strongly market the concession stand and create community involvement and programming (i.e. movie or concert series or art installations), which could greatly increase the demand (and thus revenue)
 - Use the space efficiently so that the concession stand can produce revenue even during the wintertime or off-peak hours (i.e. Commissary or base of operations for on-site or off-site catering services)
 - Use staff and volunteers efficiently so that staffing costs can be reduced
 - Find many opportunities to implement more activities and products that can increase profit
- 6. Consideration of rent, or fees to the park, are an important element. In our work, efforts to maximize dollars going back to the park, or "Friends of the Park" group, was a priority.
- Other business models to consider may include bringing in an operator of a chain or hiring a business professional to manage the concession stand.



Communities are often very invested in parks and their concessions. However, in the cases where parks are run by city entities it can be difficult for community residents to play a prominent role in how these concessions are operated and the effect they have on their neighborhoods. We worked with the park system to develop a model that retained community input and aligned with the regulations of Philadelphia Parks & Recreation. In this model, once the concessionaire has been selected, the Parks and Recreation will enter into a professional service contract agreement with the Fairmount Park Conservancy. The Conservancy will then manage the concession agreement and provide oversight of the day-to-day operations of the concession stand on behalf of the Parks department. This includes collecting rental fees and managing the relationship with the concessionaire. Once the community group (in this case Hunting Park United) establishes its 501c3 status and increases capacity, it will be in a position to take over the management role from the Conservancy, thus playing a bigger role in the process. Once this is achieved, Hunting Park United will take over management of the concessionaire's contract.

COMMUNITY CONCESSION MANAGEMENT MODEL

STEP 1.

Parks Department and Community Partner Organization enter into professional service contract agreement. (If the Partner Organization is a 501c3, they can become a professional service provider in lieu of a partner organization.)

STEP 2.

Partner Organization manages concessionaire's contract and oversees day-to-day operations.

STEP 3.

Community Advisory Board assists Partner Organization with marketing, programming and oversight. Partner Organization assists Community Advisory Board in building capacity and obtaining 501c3 status.

STEP 4.

Community Advisory Board takes over management of and concessionaire's contract and oversight of day-to-day operations.



RESOURCES:

Nutrition-Related Links

Institute of Medicine's Nutrition Standards for Foods in Schools: www.cdc.gov/healthyyouth/nutrition/pdf/nutrition_factsheet_service.pdf

HHS & GSA's Sustainability Guidelines for Federal Concessions and Vending Operations: www.gsa.gov/graphics/pbs/Guidelines_for_Federal_Concessions_and_Vending_Operations.pdf

Park RFP Examples

Philadelphia Parks & Recreation RFP: www.phila.gov/rfp/PDFs/rfp_lloydHall_descrip.pdf

Oregon John Day County RFP: www.co.clatsop.or.us

Seattle Department of Parks and Recreation RFP: www.seattle.gov/parks/partnerships/rfp.htm

Denver Department of Parks and Recreation RFP: www.denvergov.org/parksandrec

Business Planning

Sample Business Plans: www.bplans.com
Business Plan Center: www.businessplans.org

Business Plan Templates: www.bizplanit.com/resources.html

Case Studies from Other Cities

Delaware Food for the Parks:

 $www.parks conservancy. org/conservation/sustainability/food-for-the-parks. html\ Delaware\ State$

Delaware Parks Healthy Eating Initiative: www.destateparks.com/general_info/healthy-eating.asp

California State Parks: www.calparks.org/recreationHQ/health-and-wellness.html

Healthy South Dakota: www.healthysd.gov/Communities/PDF/ModelConcessions.pdf

National Recreation and Park Association NRPA ACHIEVE Case Studies Successful Practices for Building Healthier Communities: www.nrpa.org/achieve

Local Parks

Chicago Parks: www.parkconcessions.com

New York Parks: www.nycgovparks.org/facilities/food

New York Parks: www.nycgovparks.org/opportunities/concessions

Los Angeles Department of Parks: www.laparks.org/dos/concession/concession.htm

Partner Associations

Fairmount Park Conservancy: www.fairmountparkconservancy.org

Philadelphia Parks & Recreation Department: www.phila.gov/recreation

The Enterprise Center: www.theenterprisecenter.com

The Food Trust: www.thefoodtrust.org

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