Orientation to School Nutrition Management

Program Accountability, Integrity, and the Role of the Director

Instructor’s Manual

Time: 2 hours

Key Area 3: Administration
Learning Code: 3000

2017
Institute of Child Nutrition
The University of Mississippi

The Institute of Child Nutrition was authorized by Congress in 1989 and established in 1990 at The University of Mississippi in Oxford and is operated in collaboration with The University of Southern Mississippi in Hattiesburg. The Institute operates under a grant agreement with the United States Department of Agriculture, Food and Nutrition Service.

PURPOSE
The purpose of the Institute of Child Nutrition is to improve the operation of child nutrition programs through research, education and training, and information dissemination.

MISSION
The mission of the Institute of Child Nutrition is to provide information and services that promote the continuous improvement of child nutrition programs.

VISION
The vision of the Institute of Child Nutrition is to be the leader in providing education, research, and resources to promote excellence in child nutrition programs.

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture, Food and Nutrition Service through an agreement with the Institute of Child Nutrition at The University of Mississippi. The contents of this publication do not necessarily reflect the views or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. government.

The University of Mississippi is an EEO/AA/TitleVI/Title IX/Section 504/ADA/ADEA Employer.

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability.

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights; Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

© 2017, Institute of Child Nutrition, The University of Mississippi, School of Applied Sciences

Except as provided below, you may freely use the text and information contained in this document for non-profit or educational use with no cost to the participant for the training providing the following credit is included. These materials may not be incorporated into other websites or textbooks and may not be sold.

Suggested Reference Citation:

The photographs and images in this document may be owned by third parties and used by The University of Mississippi under a licensing agreement. The University cannot, therefore, grant permission to use these images.

For more information, please contact helpdesk@theicn.org.
# Table of Contents

Background Information .......................................................................................................................... 1  
Functional Area and Competencies ........................................................................................................ 6  
Lesson Objectives .................................................................................................................................. 6  
Lesson-at-a-Glance ................................................................................................................................. 7  
Preparation Checklist ............................................................................................................................. 8  
Lesson Plan ............................................................................................................................................. 9  
Objective 1 ............................................................................................................................................. 10  
Objective 2 ............................................................................................................................................. 19  
Objective 3 ............................................................................................................................................. 24  
Follow-Up Suggestions ............................................................................................................................ 34  
Key Terms ............................................................................................................................................... 35  
Supplemental Resources .......................................................................................................................... 36  
References ............................................................................................................................................. 37  
Pre//Post-Assessment ............................................................................................................................. 38
Introduction

The purpose of this lesson is to provide aspiring and new school nutrition directors with insight into the role of the director, key responsibilities of directing a school nutrition program, and the need for efficiency and professional integrity in all aspects of performance. In this lesson, accountability is viewed as a comprehensive concept that begins with the director’s role as a leader and includes financial and regulatory components as well as other types of accountability.

The School Nutrition Director as Leader

A basic principle of managing a school nutrition program is that the role of the director is one of leadership. The director recognizes the purpose and goals of the school nutrition program, accepts the responsibility to fulfill them, and acknowledges accountability to the various stakeholders in the program.

Leadership and Accountability

A second basic principle of being a leader is being accountable. Leadership and accountability are bound together. The leader of the school nutrition program is accountable for the program, its operation, and activities. The breadth of accountability is extensive. It is helpful to view accountability from two perspectives: 1) for what the school nutrition director is accountable, and 2) to whom the school nutrition director is accountable.

Types of Accountability

Four major areas of accountability for which the director is responsible are nutrition, finances, program access, and school wellness. A brief explanation of each follows:

1. **Nutrition Accountability.** This term identifies the major purpose of the school nutrition program—to provide nutritious meals for students. While some refer to
the program as “the cafeteria,” “school lunch,” or other titles, the appropriate and preferred name is “school nutrition” because nutrition is the primary focus. The U.S. Department of Agriculture (USDA) regulates the process of planning and serving nutritious meals to students. The nutrition requirements are based on the Dietary Guidelines for Americans (DGAs) and the Dietary Reference Intakes (DRIs). The director must ensure that all stakeholders know that school nutrition is accountable for complying with the USDA nutrition regulations.

2. Financial Accountability. In fiscal year 2009, the National School Lunch Program cost $12.5 billion. Data from 2009 shows the money received by each state and territory for lunch only ranged from almost 11 million to more than a billion dollars. Directors recognize that school nutrition programs are created by legislation, are funded with federal money, and operate in a regulatory environment. Regulations, policies, procedures, and guidelines assist directors in demonstrating financial accountability through documentation and reporting. Prior to February 1 every school year, each school food authority with more than one school must perform at least one onsite review of the lunch counting and claiming system employed by each school. Sound financial management and accountability are essential to the success of the school nutrition program. However, the focus of financial accountability must be the effective and efficient use of financial resources to achieve the purpose and goals of school nutrition programs.

3. Program Access Accountability. This term means ensuring that all students have access to school nutrition programs. School nutrition programs are funded by legislation passed by the U.S. Congress and administered by the USDA’s Food and Nutrition Service (FNS) as part of a national safety net to ensure the health and well-being of the nation’s children. School nutrition programs must make every effort to inform the public that the programs are available to all schoolchildren. Every child in a school participating in the National School Lunch and Breakfast Program must have the opportunity to eat the meals provided, and every household must have the opportunity to apply for reduced price or free meals. Districts may differ in how access is ensured or information is made
available, but each is accountable for ensuring that the families of all students are aware that school meals are available.

4. **School Wellness Accountability.** In 2006, the U.S. Congress required that all school districts participating in the National School Lunch Program (NSLP) and the School Breakfast Program (SBP) develop and implement a local wellness policy. The legislation emphasized that the school nutrition program is an integral part of wellness and the development of local wellness policies must involve representatives of a variety of stakeholders, including the school nutrition program employees. Directors have the opportunity to be actively involved in developing healthy school environments.

**Accountability**

School nutrition programs and the directors are accountable to students in schools participating in the National School Lunch and School Breakfast Programs. Community members are considered stakeholders because school nutrition is supported by federal, state, and sometimes local public funds. Other individuals and groups who have a stake in school nutrition include but are not limited to the following:

- parents and guardians of students attending school;
- school and district administrators, staff, and personnel;
- producers and vendors of food, equipment, and supplies used by the schools in preparing school meals;
- individuals in the community, such as medical and social services personnel, who work with schools and have a vested interest in the health and well-being of students;
- community members such as university extension personnel, elected and appointed community leaders, individuals who operate community programs (i.e., recreation programs), and civic organizations who share concern about the nutrition and health of children; and
- state and federal personnel who administer the school nutrition programs.
Compliance

Part of program accountability is compliance with state and federal regulations. Programs that are federally supported, such as the school nutrition program, are accountable for the funds used to support them. Many view accountability and compliance as synonymous; however, accountability is a more comprehensive term than compliance and carries responsibilities broader than simple conformance with regulations. In addition to compliance with regulations, accountability includes meeting responsibilities to internal stakeholders, such as students and administrators, and external stakeholders, such as parents and community leaders.

Accountability Tools

Knowledge, Skills, and Abilities. Extensive knowledge and skills are needed to effectively demonstrate accountability in school nutrition programs. As an example, for nutrition accountability the school nutrition director must have the knowledge and ability to plan menus that meet USDA requirements. Additional knowledge needed includes amounts to be served, preparation techniques, ingredient availability, costs, and equipment operation. Many skills contribute to the service of attractive nutritious meals. The school nutrition director must communicate effectively with many individuals and groups such as students, administrators, parents, teachers, staff, state agency personnel, and vendors. The knowledge and skills needed by school nutrition directors cannot be obtained quickly and must be maintained and updated on a continuing basis. Professional development is a requirement for being accountable in leading a multifaceted school nutrition program in a highly dynamic environment.

1.  **Integrity.** Success as a school nutrition leader depends on integrity. It is the attitude, commitment, and passion with which the school nutrition director approaches the job of leading the school nutrition program. Integrity means that the school nutrition director/leader:
   - strives to be honest and open in fulfilling all obligations;
   - performs with due diligence to complete responsibilities and contributes the time, effort, and expertise needed to complete the duties of the position;
• makes maximum use of the resources available to support school nutrition programs;
• adheres to the major purpose of the school nutrition program which is nutrition for children;
• builds accountability standards into the program as a means of helping programs operate as intended and to continuously improve;
• strives to help stakeholders recognize that the school nutrition program is an important part of the educational day; and
• views wellness and a healthy school environment as an opportunity and responsibility to contribute to student health and learning.

Role of the School Nutrition Director
As the leader of the school nutrition program, the director must lead the program, recognize the purpose and goals of the program, and accept responsibility to fulfill the purpose and goals. The director is accountable for the program to a variety of stakeholders and must use program knowledge, skills, abilities, and integrity to meet the standards for effective functioning as a school nutrition director. Accountability and integrity are components integral to the role of the school nutrition director.
Functional Areas and Competencies

Functional Area 9: Program Management and Accountability

Competency 9.1: Establish a system to ensure nutrition, financial, and regulatory accountability of the school nutrition program.

Competency 9.2: Provide leadership to position the school nutrition program as an integral component of the school district.


Lesson Objectives

At the end of this lesson, participants will be able to accomplish the following:

1. Describe the leadership role of the school nutrition director in achieving the purpose and goals of the school nutrition program.

2. State the school nutrition director’s areas of responsibility for leadership and accountability.

3. Identify the skills needed to provide leadership and ensure accountability for the school nutrition program.
# Lesson-at-a-Glance

<table>
<thead>
<tr>
<th>Time Allowed</th>
<th>Topic</th>
<th>Activity</th>
<th>Materials</th>
</tr>
</thead>
</table>
| 5 minutes    | • Introduction to lesson  
   • Openers | • Welcome  
   • Pre-Assessment  
   • Group name  
   • Defining accountability and integrity | • Participant’s Workbook  
   • Pre-Assessment  
   • Flip charts, markers  
   • Self-adhesive note pad  
   • Name tents |

**Objective 1:** Describe the leadership role of the school nutrition director in achieving the purpose and goals of the school nutrition program.

| 1 hour 15 minutes | • The director as school nutrition leader  
   • The leader is accountable | • Leadership and accountability  
   • Accountability Responsibility  
   • Leadership Efficiency  
   • Job Description Review  
   • Office Organization  
   • Calendar of Responsibilities  
   • Key Resources | • Participant’s Workbook  
   • Highlighters |

**Objective 2:** State the school nutrition director’s areas of responsibility for leadership and accountability.

| 15 minutes | • Group organization  
   • Four kinds of accountability | • Accountability, integrity, and the role of the director  
   • The four kinds of program accountability | • Participant’s Workbook  
   • Flip charts, markers |

**Objective 3:** Identify the skills needed to provide leadership and ensure accountability for the school nutrition program.

| 20 minutes | • Tools of accountability  
   • Knowledge, skills and abilities  
   • Professional integrity | • Accountability tools  
   • Knowledge  
   • Skills and abilities  
   • Job description review  
   • Professional integrity  
   • Nutrition integrity  
   • Review | • Participant’s Workbook |

| 5 minutes | • Wrap-up | • Post-Assessment  
   • Evaluations | • Post-Assessment  
   • Evaluations |

**120 minutes = 2 hours**
## Preparation Checklist

**Instructions:** The following tasks are necessary for presenting this lesson. Assign each task to a specific person and determine the date that each task must be completed. Keep track of the progress by recording information on the tracking form and checking off tasks as they are completed.

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve equipment and gather supplies as needed for use on the day of class (6 weeks prior).</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Instructor Manual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roster of participants attending for instructor</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Participants’ sign-in sheets</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Pre/Post-Assessment</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td><strong>List of equipment and supplies needed</strong></td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Microphone (preferably wireless)</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Computer to present slides and DVD</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Projector and screen</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Wireless presenter device and laser pointer</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Flip chart paper (self-adhesive strip sheets)</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Painter’s tape (do not use masking tape)</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Markers (flip chart)</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Pens, pencils, note paper, highlighters, self-adhesive notes, page markers, index cards (each table)</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Name tags and table tents</td>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td><strong>Participant’s Workbook</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agenda, roster of presenters/participants, and handouts</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lesson Plan

Introduction

SHOW: Slide Program Accountability, Integrity, and the Role of the Director

Instructor’s Note: Have slide showing as participants enter.

SAY:

My experience in school nutrition has largely been ___________. I have had many opportunities to work with directors, so I know you have an important job. I appreciate being here with you.

Instructor’s Note: Greet group and give your name.

Openers

DO:

(Workbook Activity) Group Name

SAY:

Let’s get started by setting up working groups. We will consider each table a group. So, the first thing to do is to name your group. Give it a name that describes its members or some desirable trait. An example might be The Kitchen Crew or the Magic Meals. You can come up with better ones, so take about a minute to pick your name. Write it on the blank table tent on your table, and then fold it with the name to the outside so we can all see your new name.

*Instructor’s Note: Throughout the lesson, call groups by their selected names.

DO:

(Workbook Activity) Defining Accountability and Integrity
SAY:
Four flipchart sheets are posted on the wall. Two have accountability and two have integrity written at the top:
- Using your marker, write the first two words that come to mind under the titles on the flip chart paper.
- You only need to write on one sheet per topic.
- You have about 4 minutes to complete this activity, and then we will discuss your responses.

Instructor’s Note: Allow time to complete the activity.

ASK:
When we say accountability, what do we mean? For example, each school year, prior to February 1, school food authorities with more than one school must perform an onsite review of the lunch counting and claiming system used.
(Pause and give time for a few to answer; try to get answers from different tables.)
How about integrity?
(Pause and give time to answer; get answer from tables that did not answer before.)
Instructor’s Note: After participants have had time to respond, let the groups know that you will keep the lists posted so they can use them in the lesson or add to them as you work through the lesson.

Objective 1: Describe the leadership role of the school nutrition director in achieving the purpose and goals of the school nutrition program.

SHOW: Slide Objective 1

SAY:
Let’s look at Objective 1, describing the director’s role as a leader of school nutrition, as you work to achieve the purpose and goals of the school nutrition program. Review the introduction found at the beginning of your Participant’s Workbook. (Pause and give 2 minutes to read.)
DO:

(Workbook Activity) Leadership and Accountability

SAY:

Now I am going to make a few statements about leadership and your role as the school nutrition director. These statements are in your Participant’s Workbook. If the statement I read is true, say “Yes.” If I make a statement that is not true, say “No.”

_Instructor’s Note:_ Use the feedback section below to explain why yes or no is the desired answer. Focus on the fact that although there may be many involved and lots of help is available, the director is the leader and is accountable.

1. The leader of the district school nutrition program is the district director.
2. The leadership of the district school nutrition program is shared by the district superintendent and the school nutrition director.
3. The person who is accountable for the district school nutrition program is the school nutrition director.
4. The state school nutrition office is accountable for the district school nutrition program.
5. Accountability and leadership are two separate things: the school nutrition director may be the leader of the program but may not be accountable for the program.

FEEDBACK:

1. YES. The leader of the district school nutrition program is the district director. When you accept the office, you become the leader. (*Please note, different districts may use different terminology to describe this position.*)
2. NO. The leadership of the district school nutrition program is shared by the district superintendent and the school nutrition director. The superintendent is the leader of the school district and all the programs in the district, but leadership for each program is assigned to different individuals. For example, there is usually a curriculum leader, a personnel leader, and a financial leader. School nutrition directors are the leaders of school nutrition programs.
3. YES. The person accountable for the district school nutrition program is the school nutrition director. *(Please note, different districts may use different terminology to describe this position.)*

4. NO. The state school nutrition office is accountable for district school nutrition programs. School nutrition directors cooperate and work with the state office.

5. NO. Accountability and leadership are separate concepts but are linked. Leadership encompasses both accountability and responsibility.

**DO:**

*(Workbook Activity) Job Description*

**SAY:**

Before we move on, take a look in your Participant’s Workbook at a job description for a school nutrition director. Look over it and note the knowledge, skills, and abilities required for this job and using a highlighter, highlight the key areas of responsibility. As you read, compare this job description to your own and ask yourself the following questions:

- How do these areas compare to your own job description?
- Would revisions make your job description more complete?
- Are there responsibilities listed in the example that are not required of your position?

***************JOB DESCRIPTION***************

**From North Carolina Department of Public Instruction**
http://www.ncpublicschools.org/docs/work4ncschools/employment/jobdesc/childnutdir.job.pdf

*Please note:* This specification has been designed to represent the general nature and level of work found in positions in this class. As such, it is not intended to contain all of the duties and qualifications required of an employee in a single position (job). Consequently, it is not to be perceived as a position (job) description or as identification of essential functions as required by ADA. Always contact the school system in which you are interested for a finalized job description.

**POSITION:** Child Nutrition Director

**SALARY GRADE:** Negotiable
**NATURE OF WORK:** An employee in this class is responsible for the administration of the Child Nutrition Program within a school district. The Child Nutrition Programs include the National School Lunch Program and School Breakfast Programs, the After School Snack Program, the Seamless Summer Food Service Program and other programs available through the US Department of Agriculture. Work is directed through the interpretation of federal and state regulations and a variety of nutritional, operational and financial policies and procedures established by the US Department of Agriculture and the NC Department of Public Instruction and State Board of Education. This employee exercises considerable discretionary judgment and analysis in the identification and resolution of problems. The employee receives general direction from the LEA’s Superintendent or other designated administrator of operational and/or support services. The Child Nutrition Director is responsible for the oversight of the Child Nutrition Program on behalf of the local Board of Education and directly supervises Child Nutrition personnel including, but not limited to, supervisors, accountants/bookkeepers, data management personnel, school nutrition managers, support staff, and other school nutrition personnel.

**ILLUSTRATIVE EXAMPLES OF WORK**

**Personnel Management**
- Prepares job descriptions
- Interviews candidates for employment
- Makes hiring decisions on behalf of the LEA
- Prepares required documents for personnel decisions
- Supervises personnel within the Child Nutrition Program
- Develops/Implements employee performance management system
- Maintains appropriate personnel records
- Conducts appropriate staff meetings
- Determines staff training/development needs
- Develops/Implements appropriate staff training and development
- Establishes staffing formula for schools to ensure optimal productivity
- Balances labor and food costs to promote operational success

**Financial Management and Recordkeeping/Reporting**
- Projects annual operating budget and manages the budget on a monthly basis
- Develops, implements and monitors internal controls to ensure financial accountability and program integrity
- Establishes inventory management and control systems
- Projects operating costs based on meal equivalents
- Projects revenues and expenditures
- Prepares justification for budget requests
- Recommends meal and a la carte sales prices
- Tracks revenues and expenditures by object codes
- Implements and monitors a reliable system of cash management
- Oversees payment of invoices in an accurate and timely manner
- Maintains fixed asset inventory
- Prepares required reports
- Retains appropriate financial and participation records

**Purchasing and Contracting**

- Develops and revises (as needed) the district’s Child Nutrition Program procurement plan and ensures the plan is consistent with Federal, State and local procurement regulations and policies
- Develops and submits product bid specifications for all foods and supplies to prospective vendors
- Evaluates bids and product quality prior to awarding contracts
- Recommends vendors to receive product contracts
- Monitors the Terms and Conditions of the contracts to ensure Contractor compliance
- Oversees testing of products
- Develops and submits Requests for Proposals for non-food items including equipment, technology/software, and services
- Conducts Competitive Negotiations with potential vendors as needed
- Enforces the districts Procurement Code of Ethics to ensure integrity in the procurement process and prevent potential conflicts of interest

**Food Production and Service**

- Establishes, implements, and evaluates policies and procedures for quality standards and quantity control
- Provides leadership in developing recipes following USDA guidelines
- Ensures production records are completed accurately each day in each school within the district
- Plans menus for breakfast, lunch, snack, summer, and catering programs
- Ensures meals and/or snacks served to students meet USDA requirements
- Establishes quality control procedures to ensure high quality school meals program
• Plans/oversees special events catering

**Compliance**

• Implements free/reduced price meal program in a manner that protects and preserves the civil rights of all students

• Ensures an accurate meal counting/claiming system throughout the district

• Ensures compliance with Federal laws, State General Statutes, policies of the NC State Board of Education, and policies/priorities of the local Board of Education

• Develops, implements and monitors the district’s mandated HACCP Plan and ensures each school is inspected at least quarterly by the local Department of Health

• Contributes to the nutrition and nutrition education components of the district’s local wellness policy; serves as part of the district’s Coordinated School Health Team

• Conducts routine on-site reviews of all facilities operated by the districts

• Implements Corrective Action when needed to address any deficiencies identified within the district’s Child Nutrition Program

• Monitors the district’s agreement with the NC Department of Public Instruction/State Board of Education to ensure the district is in compliance with the provisions of the legally-binding Agreement

• Monitors the district’s use of Federal funds to ensure they are used only for allowable purposes

**Equipment/Facility Management**

• Evaluates and projects facility and equipment needs for the Child Nutrition Program

• Coordinates maintenance and repair of equipment and facilities with internal and external sources

• Conducts follow-up on completed repairs and maintenance

**Marketing and Public Relations**

• Develops social marketing plans to involve students, parents, school personnel and community partners in the district’s Child Nutrition Program

• Seeks and responds to student, parent, media, community, and other concerns

• Maintains relationships with community agencies and collaborates to achieve mutual goals

• Prepares appropriate newsletters, news releases, and brochures to inform, involve and engage the community in various Child Nutrition initiatives
KNOWLEDGE, SKILLS AND ABILITIES

- Thorough knowledge of food systems management, including the purchasing, receiving, storage, preparation, and service of meals to students
- Thorough knowledge of the principles of optimal nutrition as applied to students
- Thorough knowledge of Federal and State regulations, policies of the NC Department of Public Instruction/State Board of Education pertaining to the operation of the Child Nutrition Program and various nutritional, operational and financial procedures as prescribed by the US Department of Agriculture
- Considerable knowledge of fiscal control and the budget management practices
- Considerable knowledge of Federal and State regulations governing the procurement of food, supplies, equipment, technology, and services in the Child Nutrition Program
- Considerable knowledge of personnel management practices
- Considerable knowledge of principles of adult learning
- Working knowledge of facility/equipment maintenance procedures
- Ability to develop and provide training programs for school nutrition personnel
- Ability to communicate effectively orally and in writing
- Ability to establish and maintain positive working relationships

SUGGESTED TRAINING AND EXPERIENCE A degree from a four year college or university in foods and nutrition, dietetics, home economics, business administration or related field with at least five years experience in food service in a commercial or institutional setting and two years experience at the management or administrative level, or an equivalent combination of education and experience.

ASK:
According to this job description from the North Carolina Department of Public Instruction, does the school nutrition director need a big toolbox for knowledge, skills, and abilities? (Allow time for discussion.)

SAY:
Obviously, with the amount of knowledge, skills and abilities needed for the school nutrition director position, some time management and organization skills are also a necessity.
DO:

(Workbook Activity) Office Organization

Instructions: Let’s take a few minutes and discuss the organization of your office. Using a piece of flip chart paper, work as team to make a list of the most important files you need and other characteristics of a well-organized office.

FEEDBACK:

Examples will include: Annual Renewal of Agreement, Amendments, Regulatory information, Bids, Reimbursement Claims, Accounts Payable, Personnel Files, payroll records, Production Records, Menus, Budget, Expense/Revenue Reports, Meal Applications and Master List.

Instructor’s Note: Allow 2-3 minutes for list and 5 minutes for sharing with group.

SAY:

Now let’s think about the bigger picture and how to organize the responsibilities of your department on an annual basis such as a calendar.

DO:

(Workbook Activity) Calendar of Responsibilities

Instructions: Work with your team and develop a calendar of “Responsibilities”. Begin your Calendar in June and include as many activities as possible for each month of the 12 month year. For June, you might begin with “Close financial reports for the school year” or “Award Fall Bids”. Not all operations will participate in the same programs or follow the same monthly schedule, but there should be a number of similarities that will help you in organizing the responsibilities of your department in an efficient calendar format. (Allow 10 minutes.)

SAY:

Now let’s share the information you’ve developed and compile a more complete annual calendar as a group. Have you included bid information, food ordering, menu planning, USDA food orders, free/reduced meal application processing, updating procedure
manuals, HACCP plans, on-site reviews, in-services, periodic meetings, marketing promotions, employee evaluations, employee recognition, staffing changes, preventive maintenance, and state reports? *(Allow for discussion.)*

**SAY:**
This calendar will change each month and each year as your responsibilities and their timelines change. It is a good resource in staying organized for an efficient operation.

**SAY:**
Another aspect of time-management and being well-organized is recognizing key resources and using them to improve program efficiency and success.

**ASK:**
What are some key resources for school nutrition programs?

**DO:**
*(Workbook Activity) Key Resources*
Let’s make a list of the key resources you would use as the school nutrition director. *(5 minutes)*

**FEEDBACK:**
Responses should include USDA website, State Agency, ICN, School Nutrition Association, School District Procurement Director, School District Business Manager, and other School Nutrition Directors. See “Supplemental Resources” at the end of this lesson for partial list.
Objective 2: State the school nutrition director’s areas of responsibility for leadership and accountability.

Instructor’s Note: Before beginning the objective, place the numbered (1-7) table tents on tables.

SHOW: Slide Objective 2

DO:
(Workbook Activity) Accountability, Integrity, and the Role of the Director

SAY:
For the rest of this lesson you will work in groups. I have assigned each named group a number from one to seven. Look in your Participant’s Workbook and you will see a section with the heading “(Group Lesson) Accountability, Integrity, and the Role of the Director.”

The groups are:
1. Collaboration
2. Training
3. Leadership
4. Responsibility in Use of Resources
5. Role of the Director in School Wellness and Healthy School Environment
6. Functional Areas and Competencies of School Nutrition Directors
7. Passion for School Nutrition and the Well-Being of Children

Instructions: Find your group’s assigned number on this list. If your group has been assigned number 1, your group will go to the Collaboration table; if your group was assigned number 2, then your group will sit at the Training table, etc. You will be there for the rest of the lesson. (Pause for time to move to tables.)
SAY:
Each group represents an idea or concept that is important for you as school nutrition directors. At the end of the lesson, I will ask each group to give a quick review of how this lesson related to your topic. There is a space in your Participant’s Workbook to make notes on what is said about your topic. You might want to put an adhesive note here to get back to it quickly. I will try to remind you at least once. Take a few seconds and write down your group concept to establish it firmly in your mind.

SHOW: Slide Types of Accountability

SAY:
Now let’s identify four kinds of accountability for school nutrition program leaders or directors.

1. Nutrition
2. Financial
3. Program access
4. School wellness

Now look a little more closely at each type of accountability.

Instructor’s Note: Ask a member from each group to come to the front and get a sheet of flip chart paper and a large marker to use to complete the activity.

DO:
(Workbook Activity) The Four Kinds of Program Accountability

Instructors Note: Blank Chart located in the participant’s workbook.

SAY:
On the chart you will see the type of accountability with which your group will work.

1. Groups 1 and 2 will complete the part of the chart on nutrition accountability.
2. Groups 3 and 4 will complete the part of the chart on financial responsibility.
3. Groups 5 and 6 will complete the part on program access accountability.
4. Group 7 will complete on school wellness accountability.
Each group needs to have a leader and a recorder/reporter. The leader in each group is the person with the most experience as a school nutrition director, and the recorder is the person with the second most experience as a school nutrition professional. The leader should get the discussion going quickly and keep it moving. The recorder/reporter will write the group’s responses on the flip chart paper and report when I call your group’s number.

What You Will Do in Your Groups

SAY:

Now let us go over the chart to clarify what each group will do. Please write your answers on the flip chart paper. As the chart indicates, you will:

1. Define your assigned accountability. This may be a brief definition, a description, or what you think of when you talk or think about this type of accountability.
2. Complete the second column with at least one example. Think about what you will be doing when you are being accountable in that particular area. What is one thing you do to show nutrition, financial, program access, or school wellness accountability?
3. Briefly state one group or person to whom you are accountable and one specific thing you are accountable for to that person or group.
4. Be brief! Be quick! You have just 8 minutes to do this and then we will share answers. You cannot dwell on any part too long. I will keep you posted on time.

Instructor’s Note: Pause for 8 minutes to allow groups to work. Make sure to let groups know when they have used half the time and when 1 minute is left. Go around to the groups and clarify as needed. When ready, call on other groups in this order:

- Groups 3 and 4 for Financial Accountability, Groups 5 and 6 for Program Access and Group 7 for Wellness Accountability.
- Use same technique as used in beginning (first group gives definition and one example; second group gives second example and response from last column on what and who).
- Use information provided in the chart to assist or give feedback as needed.
**SAY:**

Time is up. Please complete the charts as we go over the four types of accountability. Groups 1 and 2 will repeat first with Nutrition Accountability. Group 1, please report the definition or characteristics and one example only. Group 2, give another example and report on the last column, accountability to whom and what.

*(Ask reporters from Groups 1 and 2 to come to the front of the room and post their sheets and review.)*

### Answers

<table>
<thead>
<tr>
<th>Type of Accountability</th>
<th>Definition/Characteristics</th>
<th>Example(s)</th>
<th>Accountable to Whom Accountable for What</th>
</tr>
</thead>
</table>
| **1. Nutrition**       | Nutrition accountability has to do with our menus and the food we serve. We are accountable for meeting the USDA nutrition requirements that are based on the Dietary Guidelines and the RDA. This accountability is checked most closely in the School Meals Initiative review but also in menu planning and with daily production records. | • Making sure we have at least two servings of fruits and/or vegetables at lunch.  
• Making sure we offer milk, including low-fat unflavored at each meal.  
• Making sure serving size meets standard. | • First, always to students; we are a nutrition program and must be accountable for providing nutritious meals  
• Federal and state government and their regulations for nutritious meals  
• School and school community for providing nutritious meals |
| **Groups 1,2**          | **Groups 3,4**            | **Program Access** | **Accountable to students and schools for using resources wisely**  
**Program Access** Accountability has to do with letting people know that our programs are available and |

*Instructor’s Manual* 

Institute of Child Nutrition 

22
Groups 5, 6

| available to all school children. Every child must have the opportunity to participate, and every household must have the opportunity to apply for reduced price or free meals. |
| that the NSLP and/or the SBP is available at your school |
| how to use it |
| • To USDA via state agency because the regulation says we must do this |
| • To school/community so they know what we do and how we do it |

4. School Wellness

| School Wellness Accountability has to do with having a school wellness policy that was developed by a variety of people, including a representative from school nutrition; policy must include nutrition guidelines, goals for nutrition education and physical activity, and a plan for measuring implementation. |
| Serving on the school wellness team |
| Coordinating nutrition education in the cafeteria |
| Working with parents and others to help them understand that good nutrition and learning go together and are an important part of the school day |
| To students so they will understand how nutrition and wellness go together |
| To parents so they understand how food affects learning and wellness |
| To teachers so they will see how we can work together to accomplish wellness goals |

FEEDBACK

1. Nutrition Accountability—the main focus of our programs; without this focus we would not need to operate.

2. Financial Accountability—gets attention daily, but probably more at the end of the month.

3. Program Access—gets attention every time a meal is served but requires the most time and attention at the beginning of the school year.

4. School Wellness—a fairly new area of accountability; requires collaboration.
Objective 3: Identify the skills needed to provide leadership and ensure accountability for the school nutrition program.

SHOW: _Slide Objective 3_

SAY:
Look in your Participant’s Workbook and you will see that the objective is for you to identify the skills needed to provide leadership for the school nutrition program. We will look at some of the basic tools of accountability. If I asked you to tell me the basic tools you use to prepare a recipe, what would you say? (_Give time for answers._)

FEEDBACK:
Expect to hear responses such as a range, pots, pans, foods (ingredients), utensils, and the recipe. (_If the group does not include the following, ask them for some tools that are even more basic._) Suggest that some of the most basic skills used in preparing a recipe are: knowledge, such as how to read; knowledge of terms; skill in following directions handling the ingredients, using utensils, and operating the equipment.

DO:
(Workbook Activity) Accountability Tools

SAY:
List some tools of accountability in the spaces provided in your workbook. (_1 minute_)

ASK:
What are some of the things you wrote down? (_Ask one person from each table to give an answer; write down on a piece of flip chart paper._)

SAY:
The major tools of accountability I want us to look at today are important and comprehensive tools. They are listed in your Participant’s Workbook.
ASK:
What are the two major skills needed for accountability in the school nutrition program?  
(Pause and let them respond.)

FEEDBACK:
The *major* tools in the school nutrition accountability toolbox are:
1. knowledge,
2. skills,
3. abilities, and
4. professional integrity.

DO:
*(Workbook Activity) Knowledge*

SAY:
We will spend the next several minutes working with these tools. Let us look first at knowledge. You will see some examples of this major tool in your workbook. Beginning with Group 1, would someone from your group read Knowledge Statement 1. (Continue with each group reading its respective Knowledge Statement.)

1. Knowledge of the purpose of school nutrition programs and why we have them.
2. Knowledge of the requirements of your job as the school nutrition leader.
3. Knowledge of nutrition basics.
4. Knowledge of how school nutrition works—district, state, and nationwide.
5. Knowledge of how people in your community feel about school nutrition.
6. Knowledge of who is and is not participating in the programs.
7. Knowledge of how to organize and lead your school nutrition team.
8. ________________________________________________________________
9. ________________________________________________________________
10. ________________________________________________________________
ASK:
Can you think of other knowledge that is important for you to have as the school nutrition leader? There are additional blanks at the bottom of the list. *(Allow 1-2 minutes for discussion.)*

SAY:
Knowledge of how elected and governmental officials can impact the school nutrition program is often overlooked. Communicating with local, state, and federal legislators on a regular basis to educate and involve them in school nutrition issues is an important aspect of the director’s role as a leader.

DO:
*(Workbook Activity) Skills and Abilities*

**Instructions:** List an example of each skill or ability in the first column. Complete the second column with an example of where that skill or ability is needed in school nutrition.

**SAY:** Look in your Participant’s Workbook and you will see a list of skills and abilities. Let’s read them and clarify what they mean. One person at each table will read. The others at that table will give examples. Let’s start with Table 1. *(Read and give examples; if no example is offered, ask other tables to give one or offer one of the examples in italics from the following list.)*

**Activity: Skills and Abilities** *(Answers may vary; include any not mentioned.)*

<table>
<thead>
<tr>
<th>Skill or Ability</th>
<th>Example of Where Skill or Ability Is Needed in School Nutrition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Observation skills and abilities</td>
<td>• observing data from schools</td>
</tr>
<tr>
<td></td>
<td>• observing how food looks</td>
</tr>
<tr>
<td>2. Seeking skills and abilities</td>
<td>• seeking the best people to work for you</td>
</tr>
<tr>
<td></td>
<td>• seeking information on what other districts have done to improve choices of fruits and vegetables</td>
</tr>
</tbody>
</table>
| 3. Communication skills and abilities, especially listening, writing, and speaking | • listening to people as they talk about school meals  
• writing menus that communicate well with parents  
• reporting to managers and others about status of programs |
|---|---|
| 4. People skills and abilities | • talking with people about your program  
• working through problem situations with employees |
| 5. Computer skills and abilities | • how to use computers to get daily counts  
• end of month data  
• using computer to generate financial data  
• how to use the computer to locate information. |
| 6. Financial skills and abilities | • how to develop a budget  
• how to calculate meals per labor hour |
| 7. Assessing and evaluating skills and abilities | • finding out what fruits and vegetables students want more frequently  
• doing a performance evaluation of employees |
| 8. Reporting skills and abilities | • how to write an article for the paper  
• how to get the correct information to the state office on a timely basis |
| 9. Data collection skills and abilities | • how to gather information from vendors  
• how to gather information on how the wellness policies are working |

**DO:**

*(Workbook Activity) Professional Integrity*

**SAY:**

The second major accountability tool is professional integrity. Some people think it is difficult to define, and yet integrity affects each and every one of our actions. Go back to the ideas we had about integrity at the beginning of the lesson when I asked the first thing that came to your mind when you heard the word integrity. Are there some things you put on the sheet that we should put in this toolbox? There’s a space to write them in your Participant’s Workbook. *(Go back to sheet with words written at beginning; take a minute to look over the list.)*
SHOW: **Slide Professional Integrity**

SHOW: **Slide Professional Integrity (continued)**

**SAY:**
In the Participant’s Workbook, there are some statements that may help us understand why professional integrity is so important.

**Professional Integrity**
1. Professional integrity has to do with your *beliefs* about your profession that guide your actions as school nutrition director from day to day.
2. Professional integrity is a matching up of the *inside* beliefs with the *outside* actions and words.
3. Professional integrity is built on *personal integrity* and your basic beliefs about *fairness and honesty*.
4. Professional integrity is about making the right choices for the good of the overall program and acting in a manner that is fair and responsible to both the program and your employees.

**SAY:**
Also, in your Participant’s Workbook there are some examples of professional integrity that may help us better understand its importance. Let’s read them. *(Ask a volunteer to read.)*

**Examples of Professional Integrity**
1. Treating fairly all the people you with whom you work, including employees, students, teachers, administrators, vendors, and community stakeholders
2. Being honest with yourself and in all dealings with others
3. Keeping your word
4. Doing your best
5. Being sincere in your dealings with others
6. ____________________________
7. ____________________________

ASK:
Would you like to add anything to the list? *(Give time to add but move on quickly.)*

SAY:
Look back in your Participant’s Workbook at the job description for school nutrition director. Do you see anything that the school nutrition director does on that description that would be affected by professional integrity? *(Give time to look, and ask for a few answers.)*

*Instructor’s Note: If no one answers the question, ask if you could purchase food, plan menus, work with the budget, provide for training, or evaluate employees without professional integrity. Our basic beliefs influence all we do.*

SAY:
A specific area of professional integrity that is important in school nutrition is nutrition integrity. In your Participant’s Workbook you will see some information on nutrition integrity. The School Nutrition Association (SNA) defines nutrition integrity as a standard or level of performance that assures all foods and beverages available in school are consistent with the Dietary Guidelines for Americans and when combined with nutrition education, physical activity, and a healthy school environment, contributes to enhanced learning and the development of lifeline, healthy eating habits. This definition was first established in the mid-1990s and revised in 2003. It serves as a foundation for the *Keys to Excellence for School Food and Nutrition Programs*, an assessment tool for school nutrition. The SNA has stated that programs achieving excellence based on nutrition integrity should have certain goals. These 11 goals are in your workbook.

DO:
(Workbook Activity) Nutrition Integrity

SAY:
Look at the Keys to Excellence chart in the Participant’s Workbook and review the layout. The School Nutrition Association’s Keys to Excellence are in the left column; the middle column is for restating the goal simply as if you were explaining it to managers, students or teachers. The right column is for one or more examples of how it might look if the standard was applied in your school.

Instructor’s Note: Review the first two goals to show participants what they need to do in their groups. Note that there are many examples that can be used. Assign each group a goal. Tell groups they need a leader to facilitate the discussion and to watch the time. A recorder/reporter from each group will share the group’s ideas with the class.

1. Ask groups to select a reader and recorder and work quickly, and then we will share answers.
2. Ask the groups to keep answers brief; each group will have only 1 minute to report.
3. Ask if there are any questions about what to do; answer any questions.
4. Ask the groups to report, beginning with Group 3.

Each group is assigned a Key to Excellence. Column 1 identifies the Key to Excellence, column 2 is a simple way to state the goal, and column 3 is for examples of the goal. Each group should complete the columns 2 and 3 for their assigned goal(s).
### Keys to Excellence

<table>
<thead>
<tr>
<th>Keys to Excellence</th>
<th>Simple Ways to Say or State the Goal (as if you were explaining it to teachers and managers)</th>
<th>One of More Examples (what it could look like in your schools)</th>
</tr>
</thead>
</table>
| 1. Menus are planned to ensure a balance between optimal nutrition and student acceptance.  
(GroupName 1) | When planning our menus we look first at what is nutritious, and then we ask which of those things will our students eat. | At least four different fresh fruits are served every week and there are two or more choices of vegetables every day at lunch. |
| 2. Purchasing practices for foods and beverages include written specifications that reflect quality, safety, nutritional value, customer acceptance, and cost.  
(GroupName 2) | We have written standards for the food we buy; first it has to be high quality; it also has to be safe, good for you or nutritious, best price we can get, and food we know our customers will eat. | When we buy ground beef, it has less fat than that usually used by fast food or other restaurants. We are buying more whole wheat products now because they are more nutritious. |
| 3. A student-centered environment, conducive to healthy eating habits and social interaction, is provided.  
(GroupName 3) | | |
| 4. Food setup and service options are provided that encourage healthy choices and minimize the time students wait for service.  
(GroupName 4) | | |
| 5. School meals/snacks and à la carte foods contribute to healthy eating habits.  
(GroupName 5) | | |
6. School food and nutrition personnel provide opportunities to reinforce classroom nutrition education. *(Group 6)*

7. The school food and nutrition program is a resource for meeting the community’s food and nutrition needs. *(Group 7)*

8. School food and nutrition personnel work with the school community and allied organizations to promote nutritious food and nutrition education. *(Group 1)*

9. School food and nutrition program management staff work to develop partnerships with industry and commercial and non-profit food service operations to support and promote the program. *(Group 1)*

10. Training and employee orientation are available to school food and nutrition personnel, and the training responds to the district’s goals and workers’ needs. *(Group 2)*

11. School food and nutrition personnel are accepted as partners in the education of children. *(Group 2)*
DO:  
(Workbook Activity) Review

SAY:
At the beginning you were assigned to a group and asked to take notes in your workbook about what was said about that topic during the lesson. Let’s go through some of the things you wrote. I think we will have a good idea about what contributes to excellence for the leader/director of school nutrition in accountability and integrity. You may note additional comments in your workbook.

_Instructor’s Note:_ Call on each of the tables and ask them to give at least one place their group topic was mentioned in the lesson. If no one has written notes, ask them to look at the job description of the director and ask if they see anything that relates to these topics.

List one thing related to each topic that you noted during the course of the lesson.

1. Collaboration _____________________________________________
2. Training _____________________________________________
3. Leadership _____________________________________________
4. Responsibility in Use of Resources _____________________________
5. Role of the Director in School Wellness and Healthy School Environment _____________________________
6. Functional Areas and Competencies of School Nutrition Directors _____________________________
7. Passion for School Nutrition and the Well-Being of Children _____________________________
SAY:

Sometimes, after classes like this, I am tempted to say: “Now what? I have all this information and I am not sure what to do with it.” There are a few suggestions in your Participant’s Workbook. Most are things you can do to improve your knowledge, skills, and abilities and to ensure integrity. You will be learning more about many of these areas in the other lessons in this course. Now, look at this list of recommendations found in the Follow-Up Suggestions. (Read over the list quickly and if time permits, ask for one or two participant responses for each suggestion.)

Follow-Up Suggestions

1. Think about all the different kinds of knowledge school nutrition leaders need. What is one area of knowledge you feel you need to work on immediately and why?

2. What is one skill you think you need to improve that would definitely improve your leadership and accountability? What is one action you could take to improve that skill?

3. What is one thing you could do to make sure you treat people fairly? What about making sure you apply employment rules and policies fairly? Are you familiar with those rules and policies in your district?

4. Which of the nutrition integrity goals do you most need to work on?

5. How could you use the nutrition integrity goals as a training tool?
## Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountability</td>
<td>Firm adherence to a code of especially moral or artistic value; an unpaired condition; the quality or state of being complete or undivided</td>
</tr>
<tr>
<td>Compliance</td>
<td>Meeting certain rules or laws or conforming to certain accepted standards that govern the school nutrition program and providing information to show that the rules, laws, and standards have been met</td>
</tr>
<tr>
<td>Financial accountability</td>
<td>Effective and efficient use of financial resources in accordance with school nutrition policies and regulations to achieve the purpose and goals of school nutrition programs</td>
</tr>
<tr>
<td>Nutrition accountability</td>
<td>Demonstrating responsibility for and ensuring that applicable nutrition guidelines, policies, standards, and best practices are a priority in implementing the school nutrition program</td>
</tr>
<tr>
<td>Nutrition integrity</td>
<td>Standard or “level of performance” that assures all foods and beverages available in schools are consistent with the Dietary Guidelines for Americans and when combined with nutrition education, physical activity, and a healthy school environment, contributes to enhanced learning and the development of lifelong, healthy eating habits” (School Nutrition Association, 2003)</td>
</tr>
<tr>
<td>Professional integrity</td>
<td>Acting in agreement with or being faithful to the core values of one’s profession</td>
</tr>
<tr>
<td>Program access accountability</td>
<td>Demonstrating compliance with policies and regulations that govern the notification of students about their eligibility to participate in the school nutrition programs and the conditions guiding their notification and participation</td>
</tr>
<tr>
<td>School wellness accountability</td>
<td>Demonstrating the role of school nutrition in school wellness on a continuing basis, including but not limited to compliance with local, state, and federal regulations on wellness policies</td>
</tr>
</tbody>
</table>
Supplemental Resources


References


Pre/Post-Assessment

Program Accountability, Integrity, and the Role of the Director

1. Which of the following statements about leadership and the role of the school nutrition director is false?
   a. The superintendent is the leader of the school district, but leadership for the school nutrition program is assigned to the school nutrition director.
   b. The state school nutrition office is accountable for the district school nutrition program.
   c. School nutrition directors cooperate and work with the state office.
   d. Leadership encompasses both accountability and responsibility.

2. Key resources for the school nutrition director include
   a. USDA website
   b. ICN
   c. School District Procurement Director
   d. All of the above

3. School nutrition program directors are accountable for
   a. Program access
   b. School wellness
   c. Financial stability
   d. All of the above

4. Nutrition accountability deals with
   a. Meeting the USDA nutrition requirements that are based on the Dietary Guidelines and the RDA
   b. Providing accurate information on meals to support reimbursement from USDA
   c. Ensuring every household has the opportunity to apply for reduced or free meals
   d. Providing information on goal for nutrition education

5. A specific area of professional integrity that is important in school nutrition is
   a. Writing menus that communicate well with parents
   b. Observing how food looks
   c. Working through conflicts with employees
   d. Maintaining nutritional integrity

Answers: 1(b); 2(d); 3(d); 4(a); 5(d)