



Introduction to School Nutrition Leadership



INTRODUCTION TO
SCHOOL NUTRITION
LEADERSHIP

Instructor's Manual

Introduction to School Nutrition Leadership

Instructor's Manual

Time: 24 hours

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2025

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

Improve the operation of child nutrition programs through research, education and training, and information dissemination.

VISION

Lead the nation in providing research, education, and resources to promote excellence in child nutrition programs.

MISSION

Provide relevant research-based information and services that advance the continuous improvement of child nutrition programs.

Disclaimer

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Table of Contents

Overview	1
USDA Professional Standards	3
ICN Competencies	5
Ground Rules	7
Preparation Checklist for the Week	9
Lesson-at-a-Glance	11
Introduction	13
Program Accountability, Integrity, and the Role of the Director	15
Meal Accommodations	39
Reimbursable School Meals	65
Customer Experience, Merchandising, and Food Presentation	125
Food Production and Operation Management	157
Procurement and Inventory Management	203
Human Resource Management	253
Workplace Safety	295
Wrap Up	317
Appendix	337
Key Terms	339
References	359

Introduction to School Nutrition Leadership

Instructor's Note: *The purpose of the introduction section is to help you become familiar with the context of the training. It is not a part of the lesson detail.*

Overview

Welcome to the Institute of Child Nutrition's (ICN) *Introduction to School Nutrition Leadership (ISNL)*. The course is 24 hours, and the course content is divided over three days, utilizing self-paced online lessons for an unforgettable hybrid learning experience. Over the next three days, you will network with other school nutrition professionals while learning foundational topics specific to your role as a director. The lessons in this course provide an overview of the school nutrition programs, define the role and responsibilities of a director, and review the relationship between local policies and State/Federal regulations. During this course, we encourage open-group discussion so you can be actively involved in learning the skills and knowledge needed for daily operations. Key terms for each lesson are available in the back of your Participant's Workbook.

Introduction to School Nutrition Leadership topics include:

- Program Accountability, Integrity, and the Role of the Directors
- Meal Accommodations
- Reimbursable School Meals
- Customer Experience, Merchandising, and Food Preparation
- Food Production and Operation Management
- Procurement and Inventory Management
- Human Resource Management
- Workplace Safety

The *Introduction to School Nutrition Leadership* Instructor's Manual assists trainers in delivering this face-to-face training for school nutrition professionals. Each lesson includes the following components:

- Lesson Objectives
- Lesson-at-a-Glance
- Lesson Plan (including learning activities and handouts)
- PowerPoint Presentation

All handouts needed for each lesson are included in the *Introduction to School Nutrition Leadership* Instructor's Manual and Participant's Workbook. The USDA lessons and *Name That Regulation* game in this training can be found in the Supplemental Resources in the Participant's Workbook on the ICN website (theicn.org).

There are several videos used in this course; these can be found on the ICN website (Introduction to School Nutrition Leadership course materials landing page).

Download the videos to your computer prior to beginning your training. Check to make certain each video projects correctly and that the audio is working.

When administering this training, strive to follow the script and model the program provided in this Instructor's Manual. This script features the following prompts for transitioning between topics, slides, activities, and other aspects of this training:

- **SHOW SLIDE:** This prompt indicates when to show a specific PowerPoint slide.
- **SAY:** This prompt indicates what to say to the participants.
- **DO:** This prompt explains what you and/or the participants should do.
- **ASK:** This prompt indicates when you should ask the participants a question. If the question warrants feedback, the FEEDBACK prompt will follow the ASK prompt. If there are questions that you do not know the answer to, refer the participants to their State agency or the Institute of Child Nutrition's Help Desk by phone at 800-321-3054 or by email (helpdesk@theicn.org).
- **FEEDBACK:** This prompt ensures certain elements are covered in discussions, and it will state information for reviewing activities.
- **INSTRUCTOR'S NOTE:** This prompt lists information for reference purposes only; avoid sharing any information noted for this prompt with the participants.

USDA Professional Standards

1000 NUTRITION

1100 MENU PLANNING

- 1110 – USDA Nutrition Requirements
- 1120 – Cycle Menus
- 1130 – Local Foods–Farm to School
- 1160 – Special Diets, Including Food Allergies
- 1170 – USDA Foods

1200 NUTRITION EDUCATION

- 1210 – Nutrition Activities
- 1220 – Classroom and Cafeteria Integration

1300 GENERAL NUTRITION

- 1310 – Dietary Guidelines for Americans, MyPlate, and School Nutrition

2000 OPERATIONS

2100 FOOD PRODUCTION

- 2110 – Standardized Recipes
- 2120 – Food Production Records
- 2130 – Culinary Skills
- 2150 – CN Labeling and Crediting

2200 SERVING FOOD

- 2210 – Portion Sizes/Special Diets
- 2220 – Offer Versus Serve
- 2230 – Maintaining Food Quality and Appearance
- 2240 – Serving Lines

2300 CASHIER AND POINT OF SERVICE (POS)

- 2310 – Reimbursable Meals
- 2320 – POS Financial Responsibility
- 2330 – Free or Reduced Identification

2400 PURCHASING/PROCUREMENT

- 2410 – Product Specifications
- 2420 – Bid Solicitation and Evaluation
- 2430 – Purchase Food, Supplies, and Equipment
- 2440 – Food and Supplies Orders

2500 RECEIVING AND STORAGE

- 2510 – Inventory Management
- 2520 – Receiving and Storage
- 2530 – Hold and Recall

2600 FOOD SAFETY AND HACCP

- 2610 – HACCP
- 2620 – Food Safety–General
- 2630 – Federal, State, and Local Food Safety Regulations
- 2640 – Food Safety Culture

3000 ADMINISTRATION**3200 PROGRAM MANAGEMENT**

- 3210 – Staff Management
- 3220 – Standard Operating Procedures
- 3230 – Healthy School Environment
- 3240 – Emergency Plans
- 3250 – Water, Energy, and Waste Management

3300 FINANCIAL MANAGEMENT

- 3320 – Compliance with Regulations/Policies
- 3330 – Budgets
- 3340 – Financial Analysis
- 3350 – Pricing
- 3360 – Communicate Financial Information

3400 HUMAN RESOURCES AND STAFF TRAINING

- 3410 – Human Resources Management
- 3420 – Policies and Procedures
- 3430 – Training Plans and Tracking

4000 COMMUNICATIONS AND MARKETING**4100 COMMUNICATIONS AND MARKETING**

- 4110 – Strategic and Marketing Plans
- 4120 – Program Promotion
- 4130 – Customer Service
- 4140 – Communication Skills
- 4150 – School and Community Communication
- 4160 – Smarter Lunchroom Techniques

ICN Competencies

Effective Goal Setting Using SMART Goals

Functional Area 9: Program Management and Accountability

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

Program Accountability, Integrity, and the Role of the Director

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.

Reimbursable School Meals

Functional Area 1: Nutrition and Menu Planning

Competency 1.2: Ensures all meals served in the school nutrition program (SNP) meet current nutritional standards and meal pattern requirements, including children with special diet needs.

Functional Area 4: Program Regulations and Accountability

Competency 4.1: Maintains integrity and accountability of the school nutrition program (SNP) through compliance with all Federal, State, and local regulations.

Meal Accommodations

Functional Area 7: Menu and Nutrition Management

Competency 7.1: Develop guidelines for planning menus that comply with nutrition objectives and support operational goals of the school nutrition program.

Food Production and Operation Management

Functional Area 3: Food Production and Operation Management

Competency 3.1: Develop a management system to ensure high standards for quality food production.

Competency 3.2: Establish operational systems for managing food production and service.

Procurement and Inventory Management

Functional Area 8: Procurement and Inventory Management

Competency 8.1: Develop procurement guidelines that comply with established regulations and support operational goals of the school nutrition program.

Competency 8.2: Establish operational procedures to effectively manage receiving and inventory systems.

Customer Experience, Merchandising, and Food Presentation

Functional Area 6: Marketing and Communication

Competency 6.2: Develop a customer service infrastructure to promote the school nutrition program.

Marketing

Functional Area 6: Marketing and Communication

Competency 6.1: Develop a systematic approach for marketing the school nutrition program.

Key Performance Indicators

Functional Area 2: Financial Management

Competency 2.1: Develops financial management guidelines that support school nutrition program operational goals and comply with regulations.

Competency 2.2: Establishes cost control goals to effectively manage the school nutrition program.

Human Resource Management

Functional Area 5: Human Resource Management

Competency 5.1: Establish a human resource infrastructure for the school nutrition program that complies with school district policies as well as Federal, State, and local regulations.

Competency 5.2: Develop and implement a process for recruiting, hiring, retaining, and promoting qualified school nutrition staff in compliance with the school district's written procedures and labor laws.

Competency 5.3: Design a comprehensive, needs-based training infrastructure that enhances learning and improves job skills.

Food Safety

Functional Area 4: Food Security, Sanitation, and Safety

Competency 4.1: Establishes policies and procedures to ensure food is prepared and served in a sanitary and safe environment.

Workplace Safety and Emergency Preparedness

Functional Area 4: Food Security, Sanitation, and Safety

Competency 4.2: Provide leadership in creating a safe work environment for school nutrition operations.

Competency 4.3: Develop a systematic approach to address emergency and disaster situations.

Source: *Competencies, Knowledge, and Skills for District-Level School Nutrition Professionals in the 21st Century* available on the ICN website: <https://theicn.org/icn-resources-a-z/CKS-district-school-professionals>

Ground Rules

Instructor's Note: *You should have received Ground Rules mini-posters in the toolkit from ICN. Post these on the wall prior to beginning the training.*

- **Show up on time and come prepared.** Be prompt in arriving and in returning from breaks. Come with a positive attitude.
- **Stay mentally and physically present.** Be present and stay on task. Listen attentively to others and avoid disruptive side conversations.
- **Let everyone participate.** Be patient when listening to others speak. Treat all participants with the same respect that you would want from them.
- **Listen with an open mind.** Stay open to new ways of doing things, and listen for understanding. You can respect another person's point of view without agreeing with them.
- **Think before speaking.** Seek first to understand, then to be understood. Avoid using idioms, three letter acronyms, and phrases that can be misunderstood.
- **Attack the problem, not the person.** Respectfully challenge the idea, not the person. Honest and constructive discussions are necessary to get the best results.

Preparation Checklist for the Week

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.

Task	Person Responsible	Completion Date	✓
Reserve equipment and gather supplies as needed for use on the day of class (6 weeks prior). Instructor's Manual Roster of participants attending for instructor Participant sign-in sheets Pre-/Post-Assessment List of equipment and supplies needed Microphone (preferably wireless) Computer to present slides Projector and screen Wireless presenter device and laser pointer Chart paper (self-adhesive strip sheets) Painter's tape (do not use masking tape) Markers (chart paper) Pens, pencils, note paper, highlighters, self-adhesive notes, page markers, index cards (each table) Ground Rules Name tags and table tents	Instructor		

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
30 minutes	Welcome	<ul style="list-style-type: none">• Ice Breaker – Accomplishments• Pre-Assessment	<ul style="list-style-type: none">• Participant's Workbook• Pre-Assessment• Name badges and table tents
Total: 30 minutes			

Introduction

SHOW SLIDE: *Introduction to School Nutrition Leadership*

DO: Have this slide showing as participants enter the classroom.

SAY: Welcome to the Institute of Child Nutrition (ICN)'s *Introduction to School Nutrition Leadership (ISNL)*. The course is 24 hours, and the course content is divided over three days, utilizing self-paced online lessons for an unforgettable hybrid learning experience. Over the next three days, you will network with other school nutrition professionals while learning foundational topics specific to your role as a director. The lessons in this course provide an overview of the school nutrition programs, define the role and responsibilities of a director, and review the relationship between local policies and State/Federal regulations. During this course, we encourage open-group discussion so you can be actively involved in learning the skills and knowledge needed for daily operations. Key terms for each lesson are available in the back of your Participant's Workbook.

Before our training today, you were asked to complete self-paced online courses from the ICN's iLearn portal. We will not cover those courses during our training, but I will quickly highlight SMART Goals. To set clear goals, they should be written based on the SMART criteria.

- Specific
- Measurable
- Achievable
- Relevant
- Timebound

This week, you will complete SMART Goals at the end of each lesson, which you can apply when you return to your district.

Instructor's Note: Write "Bike Rack" at the top of a chart paper page and post it in a convenient area of the room.

SHOW SLIDE: *Activity: Accomplishments*

ACTIVITY: Ice Breaker – Accomplishments

Materials: None

Time: 10–15 minutes

Instructions: Ask participants to think about an accomplishment they have made as a school nutrition director. Have each participant find a partner. Allow each pair to introduce their partner to the group by telling their name, where they work, and their accomplishment.

SAY: We are getting ready to do a quick ice breaker. This activity is designed to be fun. We will be doing a lot of group activities and discussions throughout the course, so you will have a great network of friends and colleagues by the time you leave the training.

Take a minute and think about one accomplishment that you have made as a child nutrition director. Some accomplishments may include increasing participation or starting a grab and go breakfast. Find a partner that you may have never met before. Share your name, where you work, and your accomplishment. Take about 5 minutes to share with your partner. You will then introduce your partner.

DO: Allow participants to share their accomplishment with a partner.

SAY: I hope you have enjoyed getting to know one another. Now let us take a moment to introduce each other to the group. We will take turns introducing each pair. State your new friend's name, job title, where they work, and their accomplishment.

DO: Allow the pairs of participants to introduce themselves to the group.

SHOW SLIDE: **Activity: Pre-Assessment**

ACTIVITY: Pre-Assessment

Materials: Pre-Assessment

Time: 10–15 minutes

Instructions: Distribute the pre-assessment to each participant and ask him or her to complete it. Collect pre-assessments as participants finish.

SAY: We are now going to complete a pre-assessment to find out what you already know about school nutrition leadership. Please do not write your name on the assessment, instead write a simple four-digit identifier in the top right corner. Please remember your identifier so you can use it at the end of the week on your post-assessment. You might want to write it down. Answer the questions to the best of your ability. We will go over the content during the training, and we will review the answers at the end of the week. This pre-assessment should take about 10–15 minutes and is to be done individually.

DO: Give participants 10–15 minutes to complete the pre-assessment and then collect the completed pre-assessments.

Program Accountability, Integrity, and the Role of the Director for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 2 hours



Key Area: 3 (Administration)

USDA Professional Standards Code: 3000

2024

11/25/2024

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Identify the Federal school nutrition programs (SNP).
- Identify the professional standards required of school nutrition personnel and the role of ICN in training.
- Describe the school nutrition director's leadership role in achieving the purpose and goals of the SNP.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify the Federal school nutrition programs (SNP).			
15 minutes	<ul style="list-style-type: none"> Lesson Objectives Background of SNP 	Review Objectives	<ul style="list-style-type: none"> Participant's Workbook Self-adhesive note pad Blank table tents
Objective: Identify the professional standards required of school nutrition personnel and the role of ICN in training.			
15 minutes	Professional Standards	Professional Standards – see pdf	Participant's Workbook
15 minutes	Role of ICN	ICN Video	<ul style="list-style-type: none"> Participant's Workbook ICN Video
Objective: Describe the school nutrition director's leadership role in achieving the purpose and goals of the SNP.			
1 hour	School Nutrition Director Leadership Role	<ul style="list-style-type: none"> Role of the School Nutrition Director Job Description 	<ul style="list-style-type: none"> Participant's Workbook Chart paper, highlighters, and markers
15 minutes	Conclusion – SMART Goals		<ul style="list-style-type: none"> Participant's Workbook Chart paper and markers
Total: 2 hours			

Program Accountability, Integrity, and the Role of the Director

SHOW SLIDE: *Program Accountability, Integrity, and the Role of the Director*

SAY: School nutrition leadership is a very rewarding profession. As a school nutrition leader, you make a difference in students' lives every day. Your leadership impacts the lives of your students and the stakeholders of your SNP.

SHOW SLIDE: *Lesson Objectives*

DO: Review the objectives for this lesson.

Objective: Identify the Federal school nutrition programs (SNP).

SHOW SLIDE: *Program History*

SAY: As the leader of the school nutrition program (SNP), it is important that you understand the history of the federally assisted school meal programs in the United States. Federally assisted school meal programs are different than commercial and retail foodservice establishments because they follow the messages from the *Dietary Guidelines for Americans*. This is just a brief introduction of the federally assisted SNP.

ASK: Does anyone know what year the National School Lunch Act was passed by Congress?

Why did Congress authorize schools to serve lunches to children?

FEEDBACK:

- 1946
- Our country had just experienced the devastating Depression of the 1930s and then we entered World War II. Many of the young men failed their physicals because of malnutrition. Senator Richard Russell from Georgia was Head of the Senate Armed Services Committee and was troubled by this fact. He led Congress to pass the National School Lunch Act as a measure of national security, to safeguard the health and well-being of the nation's children, and to encourage the domestic consumption of nutritious commodities. In 1999, this act was re-named the Richard B. Russell National School Lunch Act.

SHOW SLIDE: *Child Nutrition Programs*

SAY: The School Breakfast Program, Afterschool Snack Program, Fresh Fruit and Vegetable Program, Child and Adult Care Food Program, and Summer Food Service Program are all under the umbrella of the National School Lunch Act.

SHOW SLIDE: *Federal, State, and Local Partnerships*

SAY: Providing meals to children is a partnership between the Federal and State governments and local educational authorities (LEA). LEAs must sign an agreement each year to participate in the Federal school meal programs and to verify they will adhere to the regulations.

ASK: How do child nutrition programs differ from other foodservice operations?

FEEDBACK:

Possible responses:

- Funded by taxpayers
- Regulated by the government (Congress, USDA)
- Nutrition and research based
- Focus on the students' needs
- Not-for-profit operation although must be financially sound
- Supports agriculture

SAY: The future of our SNPs rests with you, the current and future leaders. A strong foundation has been laid by our past leaders. This profession needs people like you who are committed to feeding healthy children and are ready to learn. It is for this reason that the School Nutrition Leadership course was developed to prepare you for your role as the leader in your school system.

Objective: Identify the professional standards required of school nutrition personnel and the role of ICN in training.

SHOW SLIDE: *Professional Standards*

PROFESSIONAL STANDARDS

SAY: On March 2, 2015, USDA's Food and Nutrition Services (FNS) published the Professional Standards for school nutrition professionals. The Food and Nutrition Service published a final rule in the **Federal Register**, 84 FR 6953, on March 1, 2019, to add four flexibilities to the hiring standards for new school nutrition program directors in small local educational agencies (LEAs) and new State directors of school nutrition programs under the Professional Standards regulations for the National School Lunch Program and School Breakfast Program.

The rule requires a minimum amount of annual training hours for all State directors of school nutrition programs, State directors of distributing agencies, school nutrition program directors, managers, and staff. Required training topic areas will vary according to position and job requirements. There are also minimum hiring standards for new State directors of school nutrition programs, State directors of distributing agencies that oversee USDA Foods, and school nutrition program directors.

Please visit Hiring Flexibility under Professional Standards at www.fns.usda.gov/cn/fr-030119 for additional information.

SHOW SLIDE: Role of the Institute of Child Nutrition

SAY: The Institute of Child Nutrition (ICN), part of the School of Applied Sciences at the University of Mississippi, is the only federally funded national center dedicated to applied research, education and training, and technical assistance for child nutrition programs. ICN was established by Congress in the Child Nutrition and WIC Reauthorization Act of 1989. It is funded by a grant administered through the USDA, FNS. The specific duties of ICN can be found in Section 21 of the Richard B. Russell National School Lunch Act. ICN's mission is to provide information and services that promote the continuous improvement of child nutrition programs. As a national center, ICN provides information, conducts applied research, and offers training and education opportunities using appropriate modalities.

SHOW SLIDE: ICN Resources

SAY: ICN provides free resources and trainings for child nutrition professionals. Some of the available resources include:

- iLearn courses
- Face-to-face trainings
- Child Nutrition Archives
- Applied Research
- Posters
- Fact sheets
- iBites news and podcasts
- Help Desk (via email and live customer assistance through our Help Desk line)

SHOW SLIDE: We Are ICN video

Instructor's Note: *The video is located at www.youtube.com/watch?v=HxalDnmQkRQ*

DO: Play **We are ICN** video.

Objective: Describe the school nutrition director's leadership role in achieving the purpose and goals of the SNP.

SHOW SLIDE: The School Nutrition Director as a Leader

SAY: A basic principle of managing a SNP is that the role of the director is one of leadership. Good leadership is essential for success as a school nutrition director, and it requires a myriad of skills. To lead effectively, the director must also recognize the purpose and goals of the SNP, and accept responsibility for achieving those goals. The director needs a good understanding of the regulations that govern child nutrition programs (CNP) and must clearly understand their role and key responsibilities. 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 of effective school nutrition directors. Accountability and integrity are integral components to the role of the school nutrition director.

SHOW SLIDE: Activity: Role of the School Nutrition Director – Accountability**ACTIVITY: Role of the School Nutrition Director – Accountability**

Materials: Role of the School Nutrition Director – Accountability handout

Time: 10 minutes

Instructions: Have participants follow along as you go over the **Role of the School Nutrition Director – Accountability** handout.

Role of the School Nutrition Director – Accountability

Leadership and Accountability

Another basic principle of being a leader is accountability. The leader of the SNP is responsible for the program and its operation. The breadth of accountability is extensive.

Types of Accountability

Four major areas of accountability for which the director is responsible are nutrition, finances, program access, and school wellness.

Nutrition Accountability

The major purpose of the SNP is to provide nutritious meals for students. While some refer to the program as “the cafeteria” or “school lunch,” the appropriate and preferred name is school nutrition because nutrition is the primary focus. The 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.

Financial Accountability

Directors recognize that SNPs are created by legislation, 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 1st of every school year, each school food authority (SFA) 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 SNP. However, the focus of financial accountability must be on effectively and efficiently using financial resources to achieve the purpose and goals of SNPs.

Program Access Accountability

The focus of this area is all students have access to SNPs. These 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. SNPs must make every effort to inform the public that the programs are available to all children ages 18 and younger. Every child in a school participating in the NSLP and SBP 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 and/or information is made available, but each is accountable for ensuring that the families of all students are aware that school meals are available.

Role of the School Nutrition Director – Accountability, continued

School Wellness Accountability

The legislation emphasized that the SNP is an integral part of wellness, and the wellness policy requirement was established by the Child Nutrition and Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Reauthorization Act of 2004. It requires each LEA participating in the NSLP and/or SBP to develop a wellness policy. The final rule expands the requirements to strengthen policies and increase transparency. The responsibility for developing, implementing, and evaluating a wellness policy is placed at the local level, so the unique needs of each school under the LEA's jurisdiction can be addressed.

The legislation emphasized that the SNP is an integral part of wellness, development of local wellness policies must involve representatives of a variety of stakeholders, including the SNP employees. Directors have the opportunity to be actively involved in developing healthy school environments.

Accountability

SNPs and the directors are accountable to students participating in the NSLP and SBPs. 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
- State and Federal personnel who administer the SNPs

Compliance

Part of program accountability is compliance with State and Federal regulations. Programs that are federally supported, such as the SNP, 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.

Role of the School Nutrition Director – Accountability, continued

Knowledge, Skills, and Abilities

Extensive knowledge and skills are needed to effectively demonstrate accountability in SNPs. 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 the ability to forecast food needs, proper 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 SNP in a highly dynamic environment.

Leadership and Integrity

Success as a school nutrition leader depends on integrity.

Integrity is the attitude, commitment, and passion that a school nutrition director demonstrates as they approach the job of leading the SNP.

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 SNPs
- Adheres to the major purpose of the SNP, 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 SNP is an important part of the educational day
- Views wellness and a healthy school environment as an opportunity and responsibility to contribute to student health and learning

SHOW SLIDE: Activity: Job Description**ACTIVITY: Job Description**

Materials: **Sample Job Description Template for District School Nutrition Directors/Supervisors** handout

Time: 20 minutes (including discussion)

Instructions: Refer participants to the **Sample Job Description Template for District School Nutrition Directors/Supervisors** handout in the Participant's Workbook. Have them read the following job description and note the knowledge, skills, and abilities required for this job, and highlight the key areas of responsibility.

SAY: Before we move on, turn in your Participant's Workbook to the **Sample Job Description Template for District School Nutrition Directors/Supervisors**. Look over it and note the knowledge, skills, and abilities required for this job. Then, using a highlighter, mark 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 my own job description?
- Would revisions make my job description more complete?
- Are there responsibilities listed in the example that are not required of my position?

Sample Job Description Template for District School Nutrition Directors/Supervisors

General Function and Scope

The District School Nutrition Director/Supervisor will oversee all aspects of the district child nutrition program (CNP) operation. The job functions include administrating, planning, directing, assessing, implementing, and evaluating the program in order to meet the nutritional and educational needs of children, as they relate to the CNP. The school nutrition professional shall partner with others in the school district and community to solicit support for the development of a sound nutrition assistance food program while following Federal, State, and local guidelines. The CNP is to provide an environment that supports healthy food habits while maintaining program integrity and customer satisfaction.

Essential Functional Areas of Responsibilities

Customer Service

- Establishes quality standards for the presentation and service of food
- Implements a district-wide customer service driven philosophy that focuses on value and satisfaction

Sanitation, Food Safety, and Employee Safety

- Establishes procedures to ensure that food is prepared and served in a sanitary and safe environment
- Develops and integrates employee safety regulations into all phases of the school foodservice operation
- Establishes procedures and policies for risk management

Financial Management and Record Keeping

- Establishes measurable financial objectives and goals for the CNP
- Manages the CNP using appropriate financial management techniques
- Implements efficient management techniques to ensure all records, and supporting documentation are maintained in accordance with local, State, and Federal laws and policies

Food Production

- Develops procedures to ensure the food production system provides safe, nutritious food of high quality
- Ensures operational procedures for efficient and effective food production and distribution

Sample Job Description Template for District School Nutrition Directors/Supervisors, continued

Procurement

- Implements a cost-effective procurement system
- Develops purchasing guidelines to ensure purchased food and supplies reflect product knowledge, customer preferences, district needs, policies, and nutrition objectives
- Establishes standards for receiving, storing, and inventorying food and non-food supplies based on sound principles of management

Program Accountability

- Ensures CNP compliance with all local, State, and Federal laws, regulations, and policies
- Provides technical assistance and training for school foodservice personnel, school administrators, and other school support staff
- Develops guidelines for providing services in response to disaster or emergency situations

Nutrition and Menu Planning

- Develops cost-effective menus that maintain nutrition integrity and meet all local, State, and Federal guidelines and regulations
- Assesses customer preferences, industry trends, and current research to plan menus that encourage participation in the CNP
- Works with school staff, teachers, parents, and physicians to plan menus for children with special nutrition needs

General Management

- Employs management techniques to maintain an effective and efficient CNP
- Develops short and long term goals through strategic planning for the district school foodservice program that supports the philosophy and policies of the Board of Education
- Implements policies and procedures to ensure the effective operations of CNPs
- Develops a long-range program for establishing professional status for the CNP's role in the education community
- Reviews current research information to determine health and nutrition-related trends and foodservice management developments; and develops innovative program changes and expansions based on this information

Sample Job Description Template for District School Nutrition Directors/Supervisors, continued

Personnel Management

- Implements personnel policies and procedures for the CNP according to local, State, and Federal regulations and laws
- Develops job performance standards that provide for performance improvement
- Develops methods for hiring, training, and evaluating personnel that recognize education, experience, performance, and certification
- Establishes procedures to implement employee contract agreements, progressive discipline, and formal grievances
- Establishes standards for the professional development of the district's CNP personnel

Facility Layout and Design and Equipment Selection

- Assists with designing and planning facilities that ensure high quality customer service, wholesome food production, and efficient workflow
- Determines equipment needs and specifications consistent with program needs and budget

Environmental Management

- Develops and implements policies and procedures to ensure environmental responsibility
- Establishes a waste management system for the CNP that is effective, economical, and environmentally safe

Marketing

- Develops a marketing plan to attract students, parents, teachers, administrators, support staff, and community
- Conducts an on-going evaluation of the marketing plan
- Communicates program information to encourage and secure support for the school food and nutrition program from the Board of Education, administrators, faculty, students, parents, and community
- Implements a plan for providing foodservice for special functions consistent with Board of Education policies

Sample Job Description Template for District School Nutrition Directors/Supervisors, continued

Computer Technology

- Implements management information systems that increase the productivity and efficiency of the school food and nutrition operation.
- Trains staff to use computer technology in individual school sites to improve management techniques.

Nutrition Education

- Develops and implements a comprehensive nutrition education program using school cafeterias as learning laboratories.
- Establishes role of the CNP as a resource for expertise in the development and presentation of nutrition education materials and activities.

Other

- Performs and directs job related proficiency with the highest ethical integrity,
- Performs and directs with a commitment to promote a quality CNP that meets the nutritional needs of the customers served.
- Performs and directs with an overall nature that is committed to the goals and visions of the school district.
- Performs and directs appropriate communication skills with the customers served.

Source: Job Description Template for CNP Directors/Supervisor/Administrator (2018, September 27). theicn.org/icn-resources-a-z/job-description-template-cnp/

ASK: In reviewing this job description, what are the many responsibilities of a director?

FEEDBACK:

- Personnel, finance and accounting, procurement, nutrition and menu planning, food production and service, compliance, facility management, marketing and public relations, food safety, workplace safety, etc.

ASK: What are some important skills and abilities that a director needs?

FEEDBACK:

- Communication skills, people skills, financial skills, knowing who and where to go to for help and training

DO: Allow time for discussion.

SAY: Yes, a director is accountable to many stakeholders and will need a big toolbox of knowledge, skills and abilities! However, there is one more important foundational trait that is key to your success—your professional integrity.

DO: Refer participant's to **Professional Integrity** Handout.

Professional Integrity

Professional Integrity

- Beliefs you have about your profession which guides your day-to-day actions as a school nutrition director
- Matching up of the inside beliefs with your outside actions and words
- Built on your personal integrity and your basic beliefs about fairness and honesty
- 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

Examples of Professional Integrity

- Fairly treating all the people with whom you work, including employees, students, teachers, administrators, vendors, and community stakeholders
- Being honest with yourself and with others
- Keeping your word
- Doing your best
- Being sincere in your dealings with others

SAY: Being a school nutrition director can be very rewarding because of the significant contributions you make in the lives of students and employees. Thank you for all you do as a school nutrition director.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

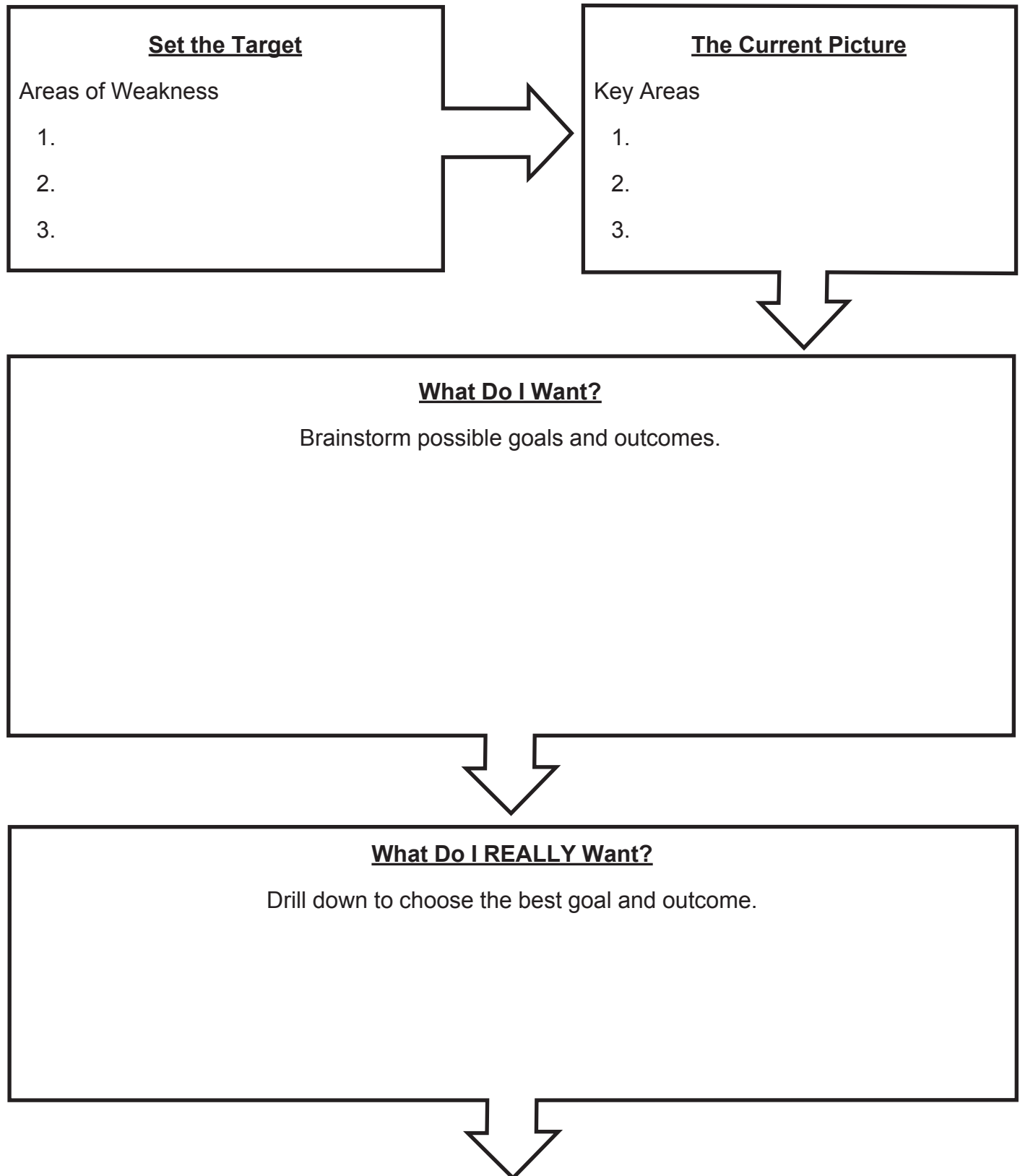
A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Program Accountability, Integrity, and your Role as the Director. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Program Accountability, Integrity, and Your Role as the Director** worksheet.

SMART Goals for Program Accountability, Integrity, and Your Role as the Director



SMART Goals for Program Accountability, Integrity, and Your Role and the Director, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u></p> <p>How will I do it?</p> <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? 	
<p><u>MEASURABLE</u></p> <p>How will I measure it?</p> <ul style="list-style-type: none"> • How much? • How many? • How will I know it has been accomplished? 	
<p><u>ACHIEVABLE</u></p> <p>Is this something I can do?</p> <ul style="list-style-type: none"> • Am I prepared to make the commitment? • Am I willing to make major changes? • Is there a more achievable goal? 	
<p><u>RELEVANT</u></p> <p>Is this based on forecasted needs?</p> <ul style="list-style-type: none"> • Do I have the resources? • Does it make sense for my program? • Does it align with my priorities and needs? 	
<p><u>TIME-BOUND</u></p> <p>Does the time frame create a practical sense of urgency?</p> <ul style="list-style-type: none"> • What can I do TODAY to reach my goal? • What can I do one week from now? • What can I do one month from now? 	
<p>MY SMART GOAL IS:</p>	

Meal Modifications for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 hour



Key Area: 1 (Nutrition)

USDA Professional Standards Code: 1160

2024

11/25/2024

Role of the School Nutrition Director

The SNP is required to offer meal modifications at no additional cost to children whose disabilities restricts their diet as defined in USDA's nondiscrimination regulations, 7 CFR Part 15b. The director of the child nutrition program ensures that meals are made available to all children, including those with disabilities. The responsibilities of the child nutrition program include the following:

- Making food substitutions or modifications for students with disabilities
- Verifying substitutions or modifications for children with disabilities are based on a prescription written by a State licensed healthcare professional
- Providing food substitutions or modifications for children without disabilities who have medically certified dietary needs and are unable to eat regular meals as prepared (Note: This is encouraged but not required.)
- Verifying substitutions for children without disabilities with medically certified dietary needs are based on a State licensed healthcare professional

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Identify major legislation related to disabilities.
- Identify food safety and financial considerations related to meal modifications.
- List required components of the medical statement.
- Identify common dietary modifications.
- Describe effective and appropriate interactions between school nutrition staff and students with disabilities and their care givers.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify major legislation related to disabilities.			
20 minutes	<ul style="list-style-type: none"> Lesson Objectives Federal State Local 	<ul style="list-style-type: none"> Review Objectives Tips for Appropriate Handling of Documentation 	Participant's Workbook
Objective: Identify food safety and financial considerations related to meal accommodations.			
15 minutes	<ul style="list-style-type: none"> Legal Considerations Food Safety Considerations Financial Considerations 	Identify Potential Problems	Participant's Workbook
Objective: List required components of the medical statement.			
5 minutes	<ul style="list-style-type: none"> Disability Reasonable Accommodations Non-disability 	Sample Medical Statement	Participant's Workbook
Objective: Identify common dietary modifications.			
10 minutes	<ul style="list-style-type: none"> Texture Calories Thickening of Liquids Diabetes Food Allergy 	Common Menu Modifications	Participant's Workbook
Objective: Describe effective and appropriate interactions between school nutrition staff and students with disabilities and their care givers.			
10 minutes	<ul style="list-style-type: none"> Dining Environment Considerations General Information Conclusion 		Participant's Workbook
Total: 1 hour			

Meal Modifications

SHOW SLIDE: Meal Modifications

SAY: Many school-age children and adolescents have health problems that require nutrition intervention and benefit greatly by modifications of the school breakfast and lunch.

We will discuss the issues involved in preparing meals at school for children with special health needs. These issues are complex and can be overwhelming, especially for a new SNP director. The lesson will provide you with the basic information to help you participate fully in the team process at school. By gaining a broad understanding of the regulations and procedures involved in meal modifications in schools, it will help guide your decisions and make the process of meeting children's meal modifications due to a disability more manageable.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

Objective: Identify major legislation related to disabilities.

SHOW SLIDE: Major Legislation

SAY: Four major pieces of Federal legislation require school nutrition services to make meal accommodations due to a disability for children.

Major Legislation Related to Disabilities:

- The Rehabilitation Act of 1973 (Section 504)
- Individuals with Disabilities Education Act 1975 (IDEA)
- The Americans with Disabilities Act 1990 (ADA)
- The Americans with Disabilities Amendments Act of 2008

SHOW SLIDES: Section 504 of the Rehabilitation Act of 1973 and Section 504 of the Rehabilitation Act of 1973, continued

SAY: Section 504 of the Rehabilitation Act of 1973 was a landmark piece of Federal legislation for people with disabilities. This legislation made it illegal to discriminate against someone because of their disability if they otherwise qualify to participate in the program or activity. This law applies to any entity that accepts even \$1 of Federal aid.

This law defined a disability as "... a physical or mental impairment which substantially limits one or more major life activities." Major life activities include such activities as eating, breathing, learning, walking, working, seeing, hearing, and speaking.

SHOW SLIDE: Individuals with Disabilities Education Act (IDEA)

SAY: The Individuals with Disabilities Education Act (IDEA) states that all children with a disability between 3 and 21 years of age are entitled to a “free and appropriate public education.”

SHOW SLIDE: Americans with Disabilities Act of 1990 (ADA)

SAY: The Americans with Disabilities Act of 1990 (ADA) is a comprehensive Federal law that further broadened and extended civil rights protection to areas of employment and public service areas such as transportation for all Americans with disabilities.

Schools that receive Federal money are legally bound to abide by these Federal laws and to make reasonable accommodations for children with disabilities.

SHOW SLIDE: The Americans with Disabilities Amendments Act of 2008

SAY: The Americans with Disabilities Amendments Act of 2008 (ADAA) made changes to the definition of the term “disability” by clarifying and broadening the definition.

DO: Review the Policy Memo SP59-2016 *Modifications to Accommodate Disabilities in the School Meal Programs*.

SHOW SLIDE: Activity: Tips for Appropriate Handling of Documentation**ACTIVITY: Tips for Appropriate Handling of Documentation**

Materials: Tips for Appropriate Handling of Documentation handout

Time: 10 minutes

Instructions: Using the list in SP59-2016, ask participants for open discussion as to how the following diseases/conditions could impact school nutrition—cross-contact, seating, menus, equipment, etc.

SAY: Let's review the **Tips for Appropriate Handling of Documentation** handout in the Participant's Workbook.

Tips for Appropriate Handling of Documentation

- All student medical information must be maintained in a confidential manner and only read with other school personnel who have direct contact with the student or who need information for the student's safety. [Federal laws—IDEA, Health Insurance Portability and Accountability Act (HIPAA) and the Family Educational Rights and Privacy Act (FERPA) require medical information to be kept confidential.]
- Never revise or change a medical statement.
- If the food-related disability changes, a new medical statement must be obtained from the State licensed healthcare professional.
- New medical statements must be dated so that it is clear which meal modification is current.
- Outdated medical statements and related documentation, such as team meeting notes, should be maintained in accordance with your school's established policies and procedures.
- All records and documentation must be held for the length of time required by your State agency or the length of the statute of limitations for general liability in your state—whichever is greater.

SHOW SLIDES: Other Reasonable Modifications and Other Reasonable Modifications, continued

SAY: In addition to the Federal laws we have just discussed, you need to be familiar with some other considerations related to serving children with meal accommodations for disabilities non-disabilities.

USDA is the Federal agency responsible for administering child nutrition programs and interprets the Federal laws that apply to child nutrition programs. These interpretations of Federal law by the USDA are called “regulations.” The regulation 2 CFR 15b spells out the parameters of the law covering disabilities. USDA FNS published an updated version of the guidance for school foodservice professionals called *Accommodating Children with Disabilities in 2017*. This new guidance has incorporated the latest laws and policies on feeding children with disabilities. In addition to *Accommodating Children with Disabilities, Guidance for School Meal Professionals* there are also questions and answers to frequently asked questions which can be helpful.

At 7 CFR 15b.4(b)(1), USDA prohibits the following discriminatory actions:

- Denying a person with a disability the opportunity to participate in or benefit from the recipient's aid, benefit, or services
- Providing a person with a disability an opportunity to participate that is not equal to the opportunity provided to others
- Providing a person with a disability an aid, benefit, or service that is not as effective as the aid, benefit, or service provided to others

- Providing a person with a disability a different aid, benefit, or service, unless doing so is necessary to provide an aid, benefit, or service that is as effective as those provided to others

Instructor's Note: *USDA policy memo (SP40-2017), 2017 Accommodating Children with Disabilities in the School Meal Programs, was published July 25, 2017. USDA policy memo, (SP26-2017) Accommodating Disabilities in the School Meal Programs: Guidance and Q&As, was published April 25, 2017.*

SAY: Courts of law issue opinions called case law. Case law provides guidance based on individual situations but may have applicability to other situations. Some of the policies you find in guidance is based on case law.

School districts have policies and procedures that impact all the schools in the school district. Child nutrition directors must understand and comply with local policies. It is likely that there is already an existing school team dealing with disability issues. Be sure to consult with your team on local policies and procedures.

All records and documentation such as medical statement must be held for the length of time required by your State agency or the length of the statute of limitations for general liability in your state—whichever is greater.

Objective: Identify major legislation related to disabilities.

SHOW SLIDE: *Food Safety Considerations*

SAY: Children are especially vulnerable to foodborne illnesses. Foodborne illness can be particularly disruptive and dangerous for children with chronic health problems.

Some children, because of their health problems, are already at high risk for choking, aspirating (an occurrence in which all or part of a food/liquid bolus enters the airway), or dehydrating. A bout of vomiting would put these children at an even greater risk of aspiration or dehydration.

Strict food safety procedures for storing, preparing, serving, and handling food for regular meals should be followed for meal modifications, formulas, and snacks. Foods to which a child has an allergy, particularly a life-threatening allergy, should be stored and prepared in a separate area to avoid cross-contact with other foods. Some critical food safety practices include:

- Washing hands frequently, properly, and at appropriate times
- Cooking foods to the proper internal temperature
- Using a calibrated thermometer for cooking, cooling, hot-holding, cold-holding, and reheating
- Cooling foods rapidly

Visit theicn.org/foodsafety to find these and many other free food safety resources.

SHOW SLIDE: Financial Considerations

SAY: There are financial considerations when accommodating children with meal modifications for disabilities/non-disabilities. Sometimes, these meal modifications can be met through minor modifications to the existing school menu at minimal or no additional cost, such as utilizing Offer Versus Serve (OVS). Other meal modifications that require special foods, supplements, or consultations with medical professionals can be a significant expense. No additional reimbursement is made for meal modifications due to a disability.

Local educational agencies must make reasonable modifications to the meal, including providing meal modifications at no extra charge.

SHOW SLIDE: Accommodation Funding

SAY: Some accommodations, such as equipment, may be funded through IDEA. Medicaid or private insurance can also be a source of funding, but can vary from state to state. Local agencies such as your health department or school parent-teacher organization may also provide funds. When requesting funds from an organization, remember to keep the identity of the child confidential unless the organization has the authority to obtain this information.

SHOW SLIDE: Reasonable Modifications

SAY: SNPs may not decline to fulfill a request for a reasonable modification unless it can document that the local educational authority cannot make the modification without “fundamentally altering the nature of the program.”

SHOW SLIDE: Using a Team Approach

SAY: USDA strongly recommends that school nutrition staff work with students, teachers, school nurses, dietitians, parents, and the child’s physician in a team approach to address the needs of children with disabilities who are unable to consume the regular school meal.

SHOW SLIDE: Procedural Safeguard Requirements

SAY: If a school food authority (SFA) declines a request, the SFA must, under the Procedural Safeguards requirements, ensure that the child’s parent or guardian understands their right to file a grievance if they believe a violation has occurred regarding the request for a reasonable modification.

More details on this process are included in the *Accommodating Children with Disabilities in the School Meal Programs, Guidance for School Nutrition Professionals*.

SHOW SLIDE: Activity: Identify Potential Problems**ACTIVITY: Identify Potential Problems**

Materials: none

Time: 5 minutes

Instructions: Have participants write down one potential problem and allow 5 minutes for interactive discussion with their group. This will allow everyone to hear and think about potential problems and consequences which may occur in relation to legal, food safety, and financial considerations.

DO: Ask participants to divide into groups.

SAY: Write down one potential problem that might occur if school nutrition staff are not trained and up to date on these legal, food safety, and financial considerations. What types of consequences might take place?

FEEDBACK:

Possible answers may include:

- Costs could be high
- Parents may be afraid to have children eat school meals
- Reasonable accommodations can vary by child, lots of additional work
- School nutrition staff may feel inadequate to prepare meals for children with meal accommodations due for disabilities

SHOW SLIDE: Disability Definition

SAY: Let's talk more about disabilities. A disability is defined as:

- A person with a physical or mental impairment that substantially limits one or more life activities. Life activities include major bodily functions
- A person who has a record of such an impairment
- Children have a medicine or device which makes them more like other children
- If the condition is temporary
- If the impairment is currently in remission, the child is still considered to have a disability
- A person who is regarded as having such an impairment

SHOW SLIDE: Determining a Disability

SAY: Since disabilities are determined on a case-by-case basis, only a State licensed healthcare professional can decide if the student's condition is a disability. SNPs should not second guess the determination of the State licensed healthcare professional in the medical statement. A State licensed healthcare professional is an individual authorized to write medical statements under State law. Registered dietitians are now allowed to submit medical statements for meal modifications for students with food-related disabilities.

SHOW SLIDE: Making Requests for Accommodations

SAY: Parents must be advised how to make requests for accommodations. Methods can include:

- Sending a message home with the free and reduced price applications
- Posting notices
- Notices in relevant publications
- Airing radio announcements
- Using other visual and auditory media

Objective: List required components of the medical statement.

SHOW SLIDE: Components of the Medical Statement

SAY: The required components in the medical statement are:

- Information about the impairment which allows the SFA to determine diet restrictions. The medical statement does not have to list the disability. It can be identified, but it is not required
- Explanation of accommodation needed
- Foods to be omitted, modified, or substituted
- Signature of a State licensed healthcare professional

The USDA cautions SFAs against undue delays in making meal modifications. SFAs are encouraged to provide meal modifications while waiting for additional clarifying information whenever possible. However, staff should not delay providing a meal modification and a safe environment (i.e., prevent exposure to known allergens) while awaiting clarification of the medical statement. Staff should follow the portion of the medical statement that is clear and unambiguous to the greatest extent possible while obtaining the additional information or amended statement. School districts may have additional requirements for medical statements.

Not all disabilities require meal modifications. Students who have trouble sleeping probably do not need a meal modification even though that issue is listed as a major life activity. Some food-related disabilities include diabetes, celiac disease, cerebral palsy, PKU, and food allergies.

SHOW SLIDE: Examples of Food-Related Disabilities

SAY: Most of us are familiar with the impact of diabetes on diet. The amount of sugar must be regulated and therefore must be tracked. With celiac disease, the gluten in bread and other foods causes problems with digestion. Cerebral palsy makes it hard to chew regular foods.

PKU or phenylketonuria occurs at birth and is the result of an inability to process the amino acid phenylalanine. Untreated PKU can lead to brain damage, seizures, behavioral problems, and mental disorders.

Food allergies can cause various levels of discomfort and can cause death.

SHOW SLIDE: Activity: Sample Diet Prescription**ACTIVITY: Sample Medical Statement**

Materials: Rachel's Medical Statement worksheet

Time: 5 minutes

Instructions: Have participants work with a partner and answer the questions for **Rachel's Medical Statement** worksheet in the Participant's Workbook.

SAY: Let's look at **Rachel's Medical Statement** worksheet in the Participant's Workbook. Work with a partner, and we will review the answers as one large group.

Rachel's Medical Statement

Instructions: Work with a partner to answer the following questions for Rachel's medical statement.

01/01/2020

"Rachel has spastic cerebral palsy. She is unable to walk independently or chew and swallow regular foods. All foods must be blended or pureed to a baby food or pudding consistency. She may not have liquids. One can of nutritional supplement with meals as needed to maintain weight within normal range. Encourage snacks of blended consistency between meals such as ice cream, pudding, or applesauce. Encourage fluids between meals."

Signed by John Smith, M.D.

Questions

1. How might Rachel's spastic cerebral palsy impact her ability to eat in the cafeteria, and how might you work with other members of the school team to accommodate her?

Rachel's meals will require cooperation between school nutrition services and other school staff. Rachel will most likely need the following accommodations:

- Longer than the normal meal period
- Adaptive equipment to encourage and maximize safe self-feeding
- Encouragement to eat and help with eating when fatigued
- Increased calories to maintain weight due to increased muscle tone
- Close supervision during meals and snacks because of high risk for choking
- Assistance with grasping and releasing eating utensils
- Recommendations from a therapist for proper positioning at mealtimes
- Menu for daily snacks between meals (so the same food is not offered every day)
- Fluids between meals

2. Rachel's condition is considered a disability. What major life activity(s) is (are) affected?

She is unable to walk independently or chew and swallow regular foods.

3. Was the medical statement provided by a State licensed healthcare professional?

Yes, the medical statement was provided by a State licensed healthcare professional.

4. Does the medical statement contain the required information?

Yes, the medical statement contains the required information.

SHOW SLIDE: Reasonable Accommodations

SAY: Reasonable accommodations:

- Are defined as a change or alteration in policies, practices and procedures to accommodate a disability
- Are made on a case-by-case basis determined by the diet prescription
- Must be related to the disability, but do not have to be exactly what is requested. If the diet prescription specifies a brand name, substitutes may be acceptable
- Do not need to mirror the meal item substituted. If a roll must be substituted, the accommodation could be a slice of gluten free bread
- Must be made at no additional charge to the child

Accommodations can include more than food modifications. It can also include foodservice aides or adaptive equipment. Your school team may be able to help determine how these extra items can be funded.

SHOW SLIDE: Substitutions for Non-Disability Dietary Preferences

SAY: The USDA encourages SFAs to consider student's non-disability dietary preferences. Examples of these include Tribal, cultural, religious, and ethical preferences. School meals regulations allow parents to request substitutions especially for milk. However, substitutions for non-disabilities are optional for the SFA.

Substitutions that do not meet the definition of a disability may be signed by a licensed medical professional or a parent. Substitution requests for non-disability dietary preferences should indicate why the substitution is being requested, as well as the foods to be omitted and foods that may be substituted. Substitutions must meet meal pattern requirements.

Milk substitutions must match the nutrient content of dairy milk. These can include lactose-free milk or other alternate milk products which meet the nutrient requirements. Juice and water do not substitute for milk.

Special requests that are not a disability may be accommodated by making school menus available to parents and students in advance, offering additional choices, or through Offer Versus Serve.

Objective: Identify common dietary modifications.

SHOW SLIDE: *Activity: Common Menu Modifications*

ACTIVITY: Common Menu Modifications

Materials: Common Menu Modifications and Modifications to the Regular Menu – Lunch handouts

Time: 10 minutes

Instructions: Review the **Common Menu Modifications** and **Modifications to the Regular Menu – Lunch** handouts with participants.

DO: Review the **Common Menu Modifications** and **Modifications to the Regular Menu – Lunch** handouts.

SAY: A variety of dietary modifications may be requested on a diet prescription. Diet prescriptions or statements can require a single modification or a combination of modifications. It is important to read each student's diet prescription carefully and ask questions for clarification as needed.

Common Menu Modifications

Changes in Texture

Changes in food texture are a commonly requested modification usually because of chewing or swallowing problems. Modifying the texture of the food makes the food safer for the child to eat. Texture modifications are frequently described as chopped, ground, or pureed. Sometimes health care professionals will use different terms to mean the same thing. This can make it difficult to know what texture modification is being requested.

Calorie Increases and Decreases

An increase or decrease in calories from the regular school menu is another commonly requested modification. Offering healthy food choices on the menu will help children who need to decrease calories be able to eat the regular school meal. Children who need additional calories may need extra portions of food or milk or may need a snack between meals.

Liquid Modifications

The diet prescription also may request that a child's liquids be modified. Liquid modification is typically requested because the child has been found to aspirate on regular liquids. The diet prescription will specify the degree to which liquids should be thickened. The terms used to describe the thickness of liquids are "nectar", "honey", and "pudding". Several thickeners are available commercially and can be added to liquids to achieve the desired thickness.

Modifications to the Regular Menu – Lunch

Menu	Low Calorie	High Calorie	Chopped	Ground	Pureed
Hamburger	No Change	Add Cheese	Cut into Small Pieces	Ground, with Cream Soup Added	Puree with Beef or Tomato Soup
Buns	No Change	Add Margarine	Cut into Quarters	Substitute Noodles	Soup or Mashed Potatoes
French Fries	Baked French Fries	No Change	Mashed Potatoes	Mashed Potatoes	Mashed Potatoes
Broccoli	No Change	Add Margarine or Cheese	Chopped and Cooked	Mashed	Blended with Cream Soup
Canned Peaches	Sugar Free Canned Peaches	No Change	Cut into Small Pieces	Chopped and Mashed	Pureed with Juice
Milk	1%	Whole	Whole	Whole	Whole

SAY: Strategies for Reducing Calories in School Lunch and Breakfast:

- Select meats, fish, and poultry low in fat
- Limit preparation to baking and broiling
- Omit frying
- Limit the serving size
- Emphasize salads and vegetables
- Replace high-sugar desserts with fruit
- Provide skim or low-fat milk

Many meal modifications for disabilities/non-disabilities are encountered in the school setting. For this lesson, we will examine two you might deal with most often: diabetes and food allergies.

A growing number of children are being diagnosed with diabetes. A person with diabetes either does not produce the hormone, insulin, or is not able to effectively use the insulin the pancreas produces. This results in higher than normal blood sugar levels. Students with diabetes typically use diabetic exchanges or carbohydrate counting to plan their meals. USDA recipes, manufacturer food labels, the American Diabetes Association and Academy of Nutrition and Dietetics' exchange lists, and nutrient analysis software offer assistance in planning and preparing food items for diabetics.

To accommodate a diabetic child, a medical statement may require an SFA to provide nutritional information for food options made available to the child. The SFA is not required to provide all nutrition information for all Program meals, as it would be very burdensome to provide this amount of information. In order to meet the child's need, the SFA could develop a cycle menu with the child's parent or guardian, the school nutritionist and nurse, and/or the child as age appropriate. Nutrition information could be provided for the foods on the cycle menu, as opposed to all foods offered through the Programs, reducing the burden on school foodservice professionals. Another common method is to share the label and manufacturers fact sheets with the school nurses and allow them to work with the family.

SHOW SLIDE: *Food Allergy*

SAY: According to the Centers for Disease Control and Prevention's (CDC) *Voluntary Guidelines for Managing Food Allergies in Schools and Early Care and Education Programs*, food allergies are a growing food safety and public health concern that affect an estimated 4%–6% of children in the United States (2013). Food allergies are a fairly common health concern, and the number of children diagnosed with food allergies is increasing. When looking at the trends of food allergies among U.S. children, the CDC's National Center of Health Statistics (NCHS) found in 2007 that three million children were reported to have a food allergy (2015). This indicated an 18% increase in the prevalence of food allergies from 1997–2007. The NCHS estimates that about 4 of every 100 children have some type of food allergy. Consequences of food allergies can be grave because they are associated with chronic conditions, such as asthma, and may even lead to death.

SHOW SLIDE: Major Allergens

SAY: The Food and Drug Administration (FDA) has identified nine major food allergens that are responsible for roughly 90% of all food-related allergic reactions. It is critically important to check food labels for allergy warnings. Food labels that are regulated by the FDA follow the regulations of the Food Allergen Labeling and Consumer Protection Act (FALCPA). FALCPA requires that the major nine food allergens be listed on the label in one of three ways: (1) using the common name, (2) common name written in parenthesis after the ingredient, or (3) in a "contains" statement. The nine major food allergens are:

- Milk
- Soy
- Wheat
- Peanuts
- Tree nuts
- Crustacean shellfish
- Fish
- Eggs
- Sesame

In 2021, the Food Allergy Safety, Treatment, Education, and Research Act (FASTER) was passed into law. This law expands what is considered a major allergen that has to be declared on a food label from eight to nine by adding sesame as a major allergen. This law will take effect in January 2023, but manufacturers may begin incorporating sesame as a major allergen on their food label before this date. Contact the food manufacturer if there is any uncertainty about a food containing sesame.

SHOW SLIDE: Anaphylaxis

SAY: Physical symptoms may occur as a result of consuming a food to which one is allergic. These may include hives, itching, scratchy throat, wheezing, and difficulty breathing or swallowing. A severe, life-threatening allergic response that may occur is called anaphylaxis. Anaphylaxis is a severe allergic reaction with a rapid onset that may cause difficulty breathing and death. It may disrupt breathing and blood circulation. An anaphylactic reaction usually occurs within minutes of being exposed to an allergen, but in some rare instances, it can occur a couple of hours later. Follow the policies and procedures established by your school and ensure that school nutrition staff receives training on emergency procedures.

SHOW SLIDE: Seating Arrangements

SAY: Program benefits should be provided in the most integrated setting appropriate to the child's needs. The child should not feel that he or she is being punished for having a disability.

Segregation for convenience is never appropriate. Discussions on seating should be held with the family to ensure that they feel that the accommodation is reasonable.

ASK: When would it be appropriate for a child to be seated or served separately?

FEEDBACK:

- Child with severe allergies to ensure food safety
- Child needs a large degree of assistance in order to eat

ASK: What do you think about this School Food Service Scenario? A large number of children in an elementary school have a peanut allergy. Should the school go “allergen aware?”

FEEDBACK:

Universal exclusion of specific foods (or food groups) is not FNS policy, but could be appropriate depending on local circumstances. However, if a school chooses to enact a universal ban, the specific allergen must never be present in the school, as the family will assume the school is a safe place for their child based on the ban.

SHOW SLIDE: School Teams

SAY: LEAs are strongly encouraged to develop a team to discuss best practices and develop a holistic plan to create a safe learning environment for children with disabilities. Using a “team approach” encourages information sharing throughout the school, and may help protect children in situations where food is served outside the cafeteria, such as during classroom parties.

The most effective team will include:

- School foodservice professionals and nutritionists
- School administrator
- School medical personnel
- Classroom teachers and aides
- Support personnel familiar with the needs of children, such as therapists and allergists
- Parents or guardians and children (when age-appropriate)
- Other school officials with relevant experience, such as special education staff

Instructor's Note: *LEAs employing 15 or more individuals must designate at least one person to coordinate compliance with disability requirements [7 CFR 15b.6]. This individual is often referred to as the Section 504/ADA Coordinator. In many cases, the Section 504/ADA Coordinator is responsible for addressing requests for accommodations in the school in general.*

Objective: Describe effective and appropriate interactions between school nutrition staff and students with disabilities and their care givers.

SHOW SLIDE: *Interaction Best Practices*

SAY: Policies, procedures, and communication with children with meal accommodations and their families should reflect the same courtesies extended to any child or family. The dining environment in which students eat is an important part of providing for the needs of children with disabilities.

- Generally, it is recommended that children with disabilities should eat in the cafeteria with the other students.
- Ample time should be allowed for the child to eat.
- Plan for space in the dining area to accommodate wheelchairs and teachers or aides who assist the child.
- Ramps or handrails may be needed to make the cafeteria accessible.
- Provide adequate lighting for students who are visually impaired.
- Provide an area where a screen could be used for children who are easily distracted.

SAY: In your Participant's Workbook you will find the **General Information for Working with Children and Adults with a Disability** handout. It offers guidance in working with children with disabilities.

Instructor's Note: *If there is time available, discuss the handout as a group. If there is not enough time, mention that the handout is in the Participant's Workbook.*

General Information for Working with Children and Adults with a Disability

- Speak as you would to any other person.
- Speak directly to the person rather than to the companion.
- When speaking to a person with a visual impairment, always identify yourself and others with you.
- Speak in a normal tone of voice unless you know the person is hard of hearing.
- Use conversation appropriate to the age of the person. Individuals with a developmental disability may be small in stature but older than they appear.
- Remember, each individual has a unique personality.
- Don't talk about the person in front of them unless it is something you want them to hear.
- Individuals with a neurological impairment may have difficulty sensing hunger or fullness.
- Continue to offer and encourage new foods that are allowed within their diet prescription.
- Do not use food for purposes of reward or punishment.
- Do not pretend that you understand an individual with a speech impairment. Ask someone familiar with the individual to help you. Individuals with a speech impairment do not always have an intellectual and developmental disability.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

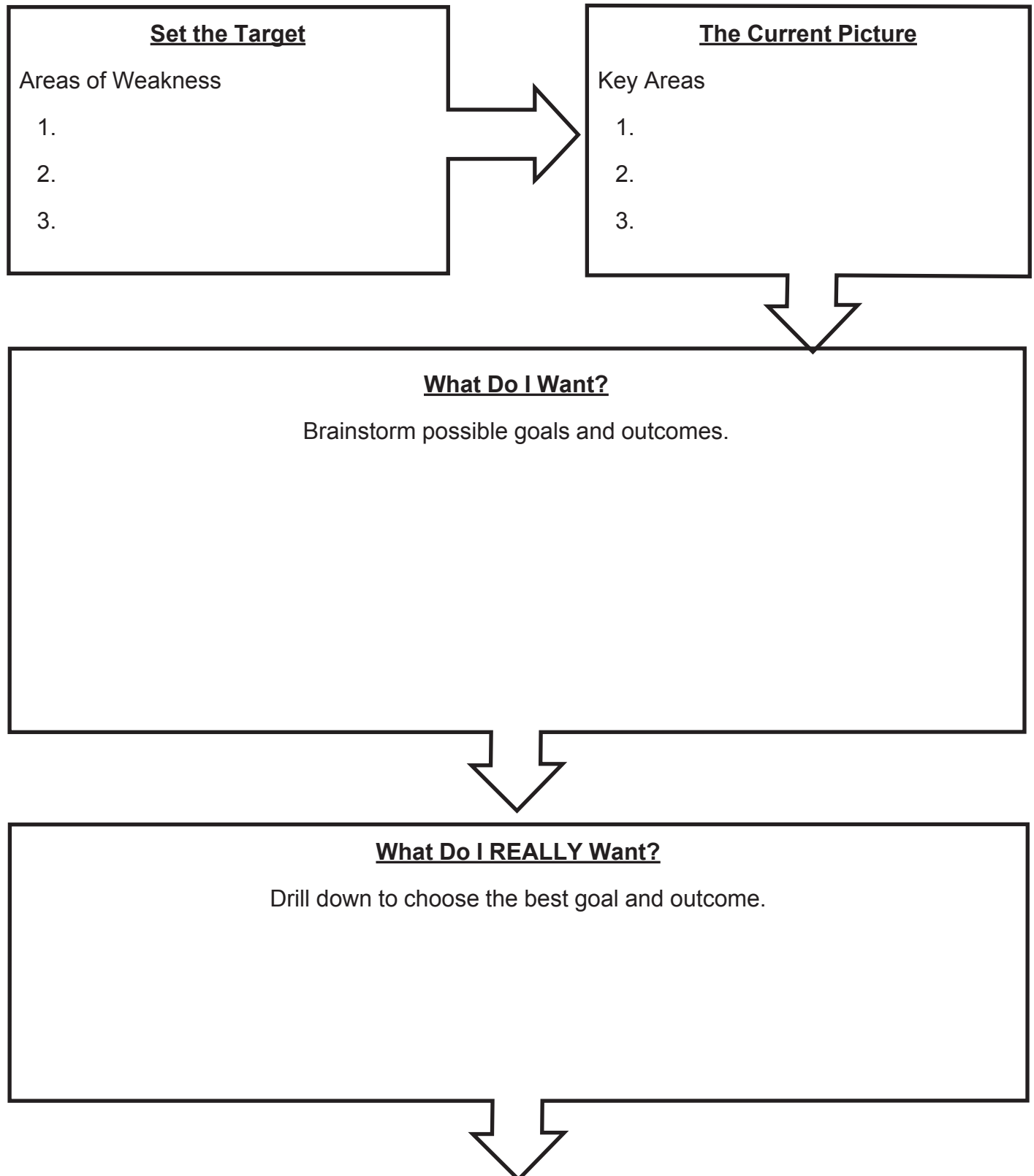
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Meal Accommodations. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Meal Accommodations** worksheet.

SMART Goals for Meal Modifications



Make sure it meets each characteristic.

<u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none">• Who?• What?• When?• Where?• How?	
<u>MEASURABLE</u> How will I measure it? <ul style="list-style-type: none">• How much?• How many?• How will I know it has been accomplished?	
<u>ACHIEVABLE</u> Is this something I can do? <ul style="list-style-type: none">• Am I prepared to make the commitment?• Am I willing to make major changes?• Is there a more achievable goal?	
<u>RELEVANT</u> Is this based on forecasted needs? <ul style="list-style-type: none">• Do I have the resources?• Does it make sense for my program?• Does it align with my priorities and needs?	
<u>TIME-BOUND</u> Does the time frame create a practical sense of urgency? <ul style="list-style-type: none">• What can I do TODAY to reach my goal?• What can I do one week from now?• What can I do one month from now?	
MY SMART GOAL IS:	

Reimbursable School Meals for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 4 hours



Key Area: 2 (Operations)

USDA Professional Standards Codes: 2220, 2310

2025

04/25/2025

Role of the School Nutrition Director

The purpose of the school meals programs is to provide safe, healthy reimbursable meals across the nation. The school meals program meal pattern requirements reflect the key food groups recommended by the Dietary Guidelines for Americans (DGAs). School reimbursable meals are required to meet specific nutrition standards in addition to the required meal components/food items.

For reimbursement, the director must ensure planned and offered school meals meet the Federal regulations, including providing all students access to the required meal components and amounts. A skilled director creates menus that are compliant with Federal regulations and student pleasing; can be prepared within the limits of the operation; and include textures, colors, and flavors, and include a variety of choices.

It is imperative for directors to understand the Federal requirements for reimbursable meals under the National School Lunch Program (NSLP) and National School Breakfast Program (SBP). As a leader, the director must understand Federal regulations, train staff on the regulations, and monitor compliance of the regulations within their operation.

Lesson Objectives

At the end of this training, participants will accomplish the following objectives.

- Recall the school lunch and breakfast reimbursable meal components.
- Identify the school lunch and breakfast fruit component requirements.
- Identify the school lunch vegetable component requirements.
- Identify the school lunch and breakfast grains component requirements.
- Identify the school lunch meats/meat alternates (M/MA) component requirements.
- Identify the school lunch and breakfast fluid milk component requirements.
- Recognize an Offer Versus Serve (OVS) reimbursable lunch meal.
- Recognize an OVS reimbursable breakfast meal.
- Discuss unit prices for a reimbursable meal.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Recall the school lunch and breakfast reimbursable meal components.			
25 minutes	<ul style="list-style-type: none"> Lesson Objectives Reimbursable School Meals 	<ul style="list-style-type: none"> Review Objectives Reimbursable School Meals Components 	Participant's Workbook
Objective: Identify the school lunch and breakfast fruit component requirements.			
20 minutes	Fruit Requirements for School Meals	School Meals Fruit Component Requirements	Participant's Workbook
Objective: Identify the school lunch vegetable component requirements.			
30 minutes	Vegetable Requirements for School Meals	Vegetable K–8 Menu	Participant's Workbook
Objective: Identify the school lunch and breakfast grains component requirements.			
20 minutes	Grains Requirements for School Meals	Grains Component	Participant's Workbook
Objective: Identify the school lunch meats/meat alternates (M/MA) component requirements.			
20 minutes	Meats/Meat Alternates Requirements for School Meals	Beans, Peas, and Lenils	Participant's Workbook
Objective: Identify the school lunch and breakfast fluid milk component requirements.			
20 minutes	Fluid Milk Requirements for School Meals	Fluid Milk Requirements	Participant's Workbook
Objective: Recognize an Offer Versus Serve (OVS) reimbursable lunch meal.			
40 minutes	Reimbursable OVS Lunch Meals	K–8 Speed Round	Participant's Workbook
Objective: Recognize an OVS reimbursable breakfast meal.			
45 minutes	Reimbursable OVS Breakfast Meals	Breakfast Scenarios	<ul style="list-style-type: none"> Participant's Workbook Calculator
Objective: Discuss unit prices for a reimbursable meal.			
20 minutes	<ul style="list-style-type: none"> Unit Price Conclusion 	K–8 Breakfast Menu Example	Participant's Workbook
Total: 4 hours			

Reimbursable School Meals

SHOW SLIDE: Reimbursable School Meals

SAY: Reimbursable school meals are required to meet specific nutrition standards also known as the meal pattern requirements. The school meals program meal pattern requirements reflect the key food groups recommended by the Dietary Guidelines for Americans. School meal pattern requirements focus on meal components, not nutrients. Students and their parents/guardians need to be aware of what is included in school meals; students, so they know how to select a reimbursable meal, and parents/guardians, so they can reinforce nutrition education messages at home.

SHOW SLIDES: Objectives and Objectives, continued

DO: Review the objectives for this lesson.

REIMBURSABLE SCHOOL MEALS

Objective: Recall the school lunch and breakfast reimbursable meal components.

SHOW SLIDE: Menu Planner

SAY: For reimbursement, the menu planner must plan and offer lunches and breakfasts that meet all applicable meal pattern requirements, including providing all students access to the required meal components and amounts. Remember, it is the role of the menu planner to plan reimbursable meals and communicate clear messages to the school nutrition staff. It is the role of the individual that prepares and/or serves and cashiers to follow the directions intended by the menu planner ensuring the students selects a reimbursable meal.

SHOW SLIDE: Menu Planner Skills

SAY: Menu planning skills include creating menus that:

- Are compliant with Federal regulations
- Are student pleasing
- Are prepared within the limits of the operation
- Include textures, colors, and flavors
- Include a variety of choices

SHOW SLIDE: Menu Choices

SAY: Menus should reflect student preferences and, as much as possible, offer choices within the meal components. For example, the menu planner may choose to offer choices within the same meal component such as allowing students to select a bagel or toast or allowing students to select two out of three vegetables. Choices provide students many opportunities to build a healthy meal. Choices can also increase the likelihood that students will select the foods and beverages they prefer, which increases consumption and reduces waste.

SHOW SLIDE: Grade Groups

SAY: Menu planners must plan lunch and breakfast menus using the grade groups K–5, 6–8, and 9–12. Specific amount of foods and average calorie levels are required for a meal to be considered a healthy school meal depending on the grade groups. Check with your State agency if your district has an unusual grade configuration.

SHOW SLIDE: Dietary Specifications

SAY: All foods and beverages in reimbursable meals contribute to the weekly dietary specifications for calories, saturated fat, added sugars, and sodium. When required by the Administrative Review of school nutrition programs, these items are included in the nutrient analysis of school menus.

SHOW SLIDE: School Lunch Calorie Range

SAY: The calorie requirements for grades K–5 (550–650 average calories per week) and grades 6–8 (600–700 average calories per week) overlap. Therefore, a school could offer both grade groups a single lunch menu with a range of 600–650 average calories per week to meet the requirement for each grade group.

Reimbursable Lunch Calorie Range Average Calories/Week		
Grades K–5	Grades 6–8	Grades 9–12
550–650	600–700	750–850

DO: Review the reimbursable lunch calorie range located on the slide.

SHOW SLIDE: School Breakfast Calorie Range

SAY: The calorie requirements for grades K–5 (350–500 average calories per week), grades 6–8 (400–550 average calories per week), and grades 9–12 (450–600 average calories per week) overlap. Therefore, a school could offer both grade groups a single breakfast menu with a range of 450–500 average calories per week to meet the requirement for each grade group.

School Breakfast Calorie Range Average Calories/Week		
Grades K–5	Grades 6–8	Grades 9–12
350–500	400–550	450–600

DO: Review the reimbursable breakfast calorie range located on the slide.

SHOW SLIDE: Saturated Fat

SAY: School lunches and breakfasts, offered to all age/grade groups, must, on average over the school week, provide less than 10 percent of total calories from saturated fat.

SHOW SLIDE: Added Sugars Limits

SAY: USDA is implementing a two-step approach to reduce added sugars in school meals. This standard allows schools to decrease added sugars over the next several years to meet the weekly dietary limit of less than 10 percent of calories across the week in the school lunch and breakfast programs.

Step 1: By July 1, 2025, schools must implement product-based limits for breakfast cereals, yogurt, and flavored milk for breakfast and lunch.

- Breakfast cereals must contain no more than 6 grams of added sugars per dry ounce.
- Yogurt must contain no more than 12 grams of added sugars per 6 ounces (2 grams of added sugars per ounce).
- Flavored milk must contain no more than 10 grams of added sugars per 8 fluid ounces
 - Competitive Foods:
 - Elementary School: No more than 10 grams per 8 fluid ounces when sold as a competitive food.
 - Middle and High School: No more than 15 grams of added sugars per 12 fluid ounces when sold as a competitive food.

Step 2: By July 1, 2027, schools must implement a weekly dietary limit for added sugars to less than 10 percent of calories per week.

SHOW SLIDE: Sodium Limits

SAY: Schools must currently meet Sodium Target 1a for school lunch:

- Grades K–5 < 1,110 mg
- Grades 6–8 < 1,225 mg
- Grades 9–12 < 1,280 mg

Beginning on July 1, 2027, schools must implement the following sodium limits for lunch:

- Grades K–5 < 935 mg
- Grades 6–8 < 1,035 mg
- Grades 9–12 < 1,080 mg

Schools must currently meet Sodium Target 1 for school breakfast:

- Grades K–5 < 540 mg
- Grades 6–8 < 600 mg
- Grades 9–12 < 640 mg

Beginning on July 1, 2027, schools must implement the following sodium limits for breakfast:

- Grades K–5 < 485 mg
- Grades 6–8 < 535 mg
- Grades 9–12 < 570 mg

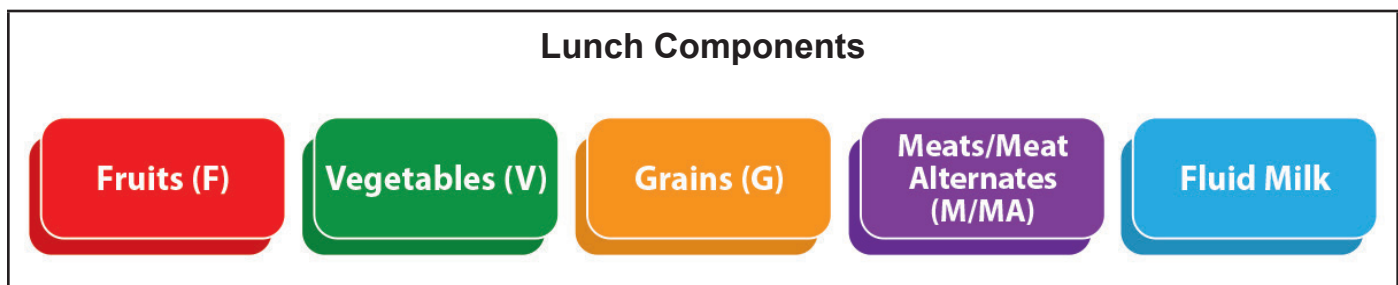
SHOW SLIDE: Meal Components for School Meals

SAY: A meal component is one of the food groups that comprises a reimbursable lunch or breakfast. There are five required meal components at lunch and three required meal components at breakfast. Meal components must be offered in at least the daily minimum required amounts and weekly minimum amounts, if applicable.

SHOW SLIDE: Meal Components for Lunch

SAY: The meal components that must be offered in a reimbursable lunch are:

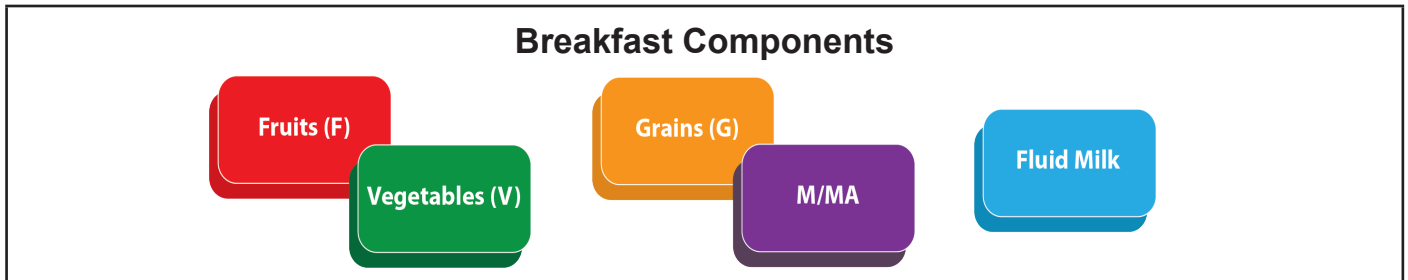
- Fruits
- Vegetables
- Grains
- Meats/meat alternates (M/MA)
- Fluid milk



SHOW SLIDE: Meal Components for Breakfast

SAY: The meal components that must be offered in a reimbursable breakfast are:

- Fruits (or vegetables as a substitute)
- Grains and/or meats / meat alternates
- Fluid milk

**SHOW SLIDE: Food Items**

SAY: A food item is a specific food offered in a reimbursable lunch from the five meal components. Food items may include multiple choices from any of the required meal components and must be offered in the minimum quantity for the meal component to be credited. For example, separate ½ cup servings of peaches, applesauce, and pears are three food items that, when selected, comprise one meal component (fruit). Although three different choices or food items are offered, all of the choices are from the same meal component (fruit). A breakfast food item is a specific food offered in a reimbursable breakfast from the three meal components. For the purposes of Offer Versus Serve (OVS), a school must offer at least four food items from the three required meal components (fruits, grains, milk).

ACTIVITY: Reimbursable School Meals Components

Materials: none

Time: 5 minutes

Instructions: Ask participants what meal components must be offered for a reimbursable breakfast and lunch. Allow participants to respond.

ASK: What meal components must be offered for a reimbursable breakfast?

FEEDBACK: Fruit or vegetables as a substitute, grains and/or meats / meat alternates, or optional meats/meat alternates, and fluid milk

ASK: What meal components must be offered for a reimbursable lunch?

FEEDBACK: Fruit, Vegetable, Meats/Meat Alternates, Grain, Fluid Milk

FRUIT REQUIREMENTS FOR SCHOOL MEALS

Objective: Identify the school lunch and breakfast fruit component requirements.

SHOW SLIDE: *Fruit Component*

SAY: The fruit component is a required meal component for a reimbursable lunch and breakfast meal. Schools may offer fruits that are fresh; frozen; canned in light syrup, water, or fruit juice; or dried. Frozen fruits with added sugar should be used in moderation to keep the average school meal within the weekly calorie ranges. Pasteurized, full-strength (100%) fruit juice may also be offered in either liquid or frozen form (it is credited to meet no more than $\frac{1}{2}$ of the fruits component offered over the week). Required quantities are established in the meal patterns for lunch and breakfast.

SHOW SLIDE: *Fruit Component Requirements for a Reimbursable Lunch*

SAY: Students in all grades must be offered daily and weekly minimum amounts for the fruit component. The minimum quantity that may be credited toward the fruit component is $\frac{1}{8}$ of a cup. Menu planners may allow for students to select more than the daily minimum serving (except for juice) for fruit if the calorie restrictions for lunches offered averaged over the school week are met.

SHOW SLIDE: *School Lunch Fruit Requirements*

SAY: Let's review the grade groups, the daily minimum fruit requirements, and the weekly minimum fruit requirements for lunch.

Reimbursable School Lunch Fruit Component		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements Offered
Grades K–5	$\frac{1}{2}$ cup	2 $\frac{1}{2}$ cups
Grades 6–8	$\frac{1}{2}$ cup	2 $\frac{1}{2}$ cups
Grades 9–12	1 cup	5 cups

DO: Review the slide and discuss the grade group, the daily minimum fruit requirement, and the weekly minimum fruit requirements that must be offered to meet the requirements of a reimbursable meal.

SHOW SLIDE: *School Breakfast Fruit Requirements*

SAY: Let's review the grade groups, the daily minimum fruit requirements, and the weekly minimum fruit requirements for breakfast.

Reimbursable School Breakfast Fruit Component		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements Offered
Grades K–5	1 cup	5 cups
Grades 6–8	1 cup	5 cups
Grades 9–12	1 cup	5 cups

DO: Review the slide and discuss the grade group, the daily minimum fruit requirement, and the weekly minimum fruit requirements that must be offered to meet the requirements of a reimbursable meal.

SHOW SLIDE: *Juice*

SAY: Pasteurized 100% full-strength fruit, fruit/vegetable, vegetable, or vegetable blend juice may be offered to meet up to half of the fruit or vegetable weekly lunch or breakfast requirements.

SHOW SLIDE: *Dried Fruit*

SAY: Whole dried fruit and whole dried fruit pieces credit at twice the volume served. For example, a $\frac{1}{4}$ cup of raisins contributes $\frac{1}{2}$ cup fruit toward the fruit requirement, as recommended by the *Dietary Guidelines for Americans*. Dried fruit is sometimes processed with sugar to keep the fruit pieces separated. Although these types of products are allowed, schools must be aware of the maximum calorie limits when offering any food with added sugar as part of the reimbursable meal.

SHOW SLIDE: *School Meals Fruit Component Requirements*

ACTIVITY: School Meals Fruit Component Requirements

Materials: School Meals Fruit Component Requirement worksheet

Time: 5 minutes

Instructions: Have participants refer to the **School Meals Fruit Component Requirement** worksheet and answer the questions at the end of the activity.

DO: Refer participants to the **School Meals Fruit Component Requirement** worksheet located in the Participant's Workbook. At the end of the activity, review the answers located in Appendix of the Participant's Workbook.

School Meals Fruit Component Requirement

Instructions: Review the breakfast and lunch menu options and identify if the fruit offered meets the fruit component criteria for a reimbursable breakfast and lunch meal for grades K–5 and grades 6–8. Answer the corresponding questions.

School Breakfast and Lunch Fruit Menu					
School Meal	Monday	Tuesday	Wednesday	Thursday	Friday
Breakfast K–5 6–8	½ cup Kiwi	½ cup Tropical Fruit	½ cup Strawberries	½ cup Sliced Peaches	¼ cup Blueberries
	4 ounce (oz) Fruit Juice	¼ cup Raisins	½ cup Fruit Salad	4 oz Fruit Juice	4 oz Fruit Juice
Lunch K–5 6–8	½ cup Applesauce	½ cup Peaches	½ cup Orange Slices	½ cup Kiwi	½ cup Sunshine Salad
	½ cup Red Grapes	¼ cup Apple Slices	½ cup Baked Cinnamon Cherries	½ cup Apricots	½ cup Strawberries and White Grapes

Note: For the purpose of this activity, students may select both fruit options at breakfast and lunch.

ASK: Does this menu meet the fruit requirements for breakfast?

FEEDBACK: No. At least 1 cup of fruit must be offered in reimbursable breakfasts for all grade groups. Only ¼ cup of blueberries are offered on Friday, and this does not meet the criteria for the breakfast fruit component.

ASK: Does this menu meet the fruit requirements for lunch?

FEEDBACK: Yes. The daily minimum fruit requirements for grades K–8 is ½ cup. Menu planners may allow students to select more than the minimum daily required serving for this meal component if the weekly dietary specifications, including calories, are not exceeded.

VEGETABLE REQUIREMENTS FOR SCHOOL MEALS

Objective: Identify the school lunch vegetable component requirements.

SHOW SLIDE: School Lunch Vegetable Requirements

SAY: Students in all grades must be offered daily and weekly minimum amounts for the vegetable component at lunch. Vegetables are not a required meal component for a reimbursable school breakfast. However, vegetables may be offered at breakfast in place of fruit. The minimum quantity that may be credited toward the vegetable component is $\frac{1}{8}$ cup. Menu planners may allow students to select more than the daily minimum serving (except for juice) for the vegetable component if the calorie restrictions for lunches offered averaged over the school week are met. Let's review the grade groups, the daily minimum vegetable requirements, and the weekly minimum vegetable requirements for lunch.

DO: Review the grade groups, the daily minimum vegetable requirements, and the weekly minimum vegetable requirements for lunch.

Reimbursable School Lunch Vegetable Component		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements Offered
Grades K–5	$\frac{3}{4}$ cup	3 $\frac{3}{4}$ cups
Grades 6–8	$\frac{3}{4}$ cup	3 $\frac{3}{4}$ cups
Grades 9–12	1 cup	5 cups

SHOW SLIDE: Vegetable Subgroups

SAY: Vegetables are organized into subgroups based on their nutrition content. Schools must offer all five vegetable subgroups over the course of a week. These subgroups include:






- Dark green
- Red/orange
- Beans, Peas, and Lentils
- Starchy
- Other vegetables

SHOW SLIDE: Subgroups

SAY: All students must have the ability to choose all subgroups each week. If a serving is less than $\frac{1}{8}$ cup of vegetables, it may not be counted to meet the vegetable component. If two subgroups are offered on one particular day and students can only select one choice, both of those two subgroups need to be offered again in the same week.

SHOW SLIDE: Subgroup Requirements

SAY: Required minimum weekly quantities for each subgroup are established in the lunch meal pattern. Larger amounts of dark green, red/orange, beans, peas, and lentils, starchy, and other vegetables may be served. The minimal weekly vegetable subgroup requirements are listed on the slide.

						Additional vegetables to meet weekly requirements
	Dark Green	Red/Orange	Beans, Peas, and Lentils	Starchy	Other	
Grades K–5	½ cup	¾ cup	½ cup	½ cup	½ cup	1 cup
Grades 6–8	½ cup	¾ cup	½ cup	½ cup	½ cup	1 cup
Grades 9–12	½ cup	1¼ cups	½ cup	½ cup	¾ cup	1½ cup

Schools may offer any of the subgroups to meet the total weekly requirement. To meet the minimum weekly vegetable requirements, grades K–5 and grades 6–8 will need to offer an additional 1 cup of vegetables from any of the vegetable subgroups. To meet the minimum weekly vegetable requirements, grades 9–12 will need to offer an additional 1 ½ cups of vegetables from any of the vegetable subgroups.

SHOW SLIDE: Dark Green Vegetables

SAY: Some examples of dark green vegetables are:

- Romaine lettuce
- Spinach
- Dark green leafy lettuce
- Mustard greens
- Broccoli
- Turnip greens
- Swiss chard
- Kale

SHOW SLIDE: Crediting Dark Green Vegetables

SAY: Raw leafy greens are credited as half the volume served (1 cup raw equals ½ cup serving of dark green vegetables). Cooked leafy green vegetables credit as volume as served; raw leafy greens credit as half volume served. Other dark green vegetables such as broccoli and cooked spinach are credited at the same volume served.

SHOW SLIDE: Red/Orange Vegetables

SAY: Some examples of red/orange vegetables are:

- Red and orange peppers
- Tomatoes
- Cherry peppers
- Sweet potatoes
- Carrots
- Hubbard squash
- Pumpkin

SHOW SLIDE: Beans, Peas, and Lentils Vegetable Subgroups

SAY: Beans, peas, and lentils can be credited toward the vegetable component because they are excellent sources of dietary fiber and nutrients such as folate and potassium. Under the school meal pattern, edamame will contribute to the beans, peas, and lentils vegetable subgroup or meats/meat alternates component. Fresh immature beans (such as green lima beans and fresh peas) are not allowed to dry on the plant and therefore do not fix nitrogen that would allow them to have higher protein content, and therefore are credited as vegetables.

SHOW SLIDE: Beans, Peas, and Lentils

SAY: Some other examples of beans, peas, and lentils are:

- Kidney beans
- Navy beans
- Edamame
- Pink beans
- Black beans
- Garbanzo beans
- Lentils
- Black-eyed peas (dry, mature)
- Split peas
- Pinto beans

SHOW SLIDE: Starchy Vegetables

SAY: The starchy vegetable subgroup includes foods such as:

- Jicama
- Plantain
- Corn
- Taro

SHOW SLIDE: Other Vegetables

SAY: The other vegetable subgroup includes foods such as:

- Zucchini
- Okra
- Avocado
- Cauliflower
- Celery
- Green beans
- Cabbage
- Cucumbers
- Belgian endive
- Onions

Instructor's Note: *The slides represent only examples of the vegetable subgroups and are not inclusive of all vegetables in the subgroup.*

SHOW SLIDE: Vegetable Mixtures

SAY: Vegetable combinations from the same subgroup (e.g., carrots ,sweet potatoes and red/orange vegetables) may count toward that single vegetable subgroup. Vegetable combinations that contain at least $\frac{1}{8}$ cup each of different vegetable subgroups (e.g., carrots and corn) may count each one toward the appropriate subgroups. If the quantities of the different vegetables are not known or starchy vegetables are in the mix, the vegetable mixture counts as additional vegetables.

ASK: Can vegetable juice blends contribute toward a vegetable subgroup?

- FEEDBACK:**
- Full-strength vegetable juice blends that contain vegetables from the same subgroup may contribute toward that vegetable subgroup. Vegetable juice blends containing vegetables from more than one subgroup may contribute to the additional vegetable subgroup.
 - For example, a full-strength carrot/tomato vegetable juice blend may credit toward the red/orange vegetable subgroup. However, a full-strength vegetable juice blend containing carrots, spinach, tomato, and watercress may only credit toward the additional vegetable subgroup.

SHOW SLIDE: *Vegetables K–8 Menu*

ACTIVITY: Vegetables K–8 Menu

Materials:

- **Vegetables K–8 Menu Activity Instructions** handout
- **Sample CN Label for Chicken Stir-Fry Bowl** handout
- **White Chicken Chili Recipe** handout
- **K–8 Sample Lunch Menu** handout
- **Vegetables K–8 Menu** worksheet

Time: 10 minutes


Instructions: Have participants refer to the **Vegetables K–8 Menu Activity Instructions** handout located in the Participant's Workbook. At the end of the activity, review the answers located in Appendix of the Participant's Workbook.

Vegetables K–8 Menu Activity Instructions

Instructions:

- Locate the **Sample CN Label for Chicken Stir-fry Bowl** handout, the **White Chicken Chili Recipe** handout, the **K–8 Sample Lunch Menu** handout, and the **Vegetables K–8 Menu** worksheet in the Participant's Workbook.
- Review the menu items.
- Identify the name of all the vegetables, portion sizes, and the appropriate vegetable subgroup. Record your answers on the **Vegetables K–8 Menu** worksheet.
- Monday menu has been completed on the worksheet as an example.

Sample CN Label for Chicken Stir-Fry Bowl

<h2 style="margin: 0;">Chicken Stir-Fry Bowl</h2> <p style="margin: 0;">Ingredient Statement: Chicken, brown rice, broccoli, red peppers, carrots, onions, water, olive oil, soy sauce, spices.</p>	
<div style="border: 1px solid black; padding: 5px; margin: 5px auto; width: 80%;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> CN 099135 </div> <p style="margin: 0;">Each 4.5 oz. Chicken Stir-Fry Bowl provides 1.5 oz. equivalent meat, 1.0 oz eq Grains, ¼ cup dark green vegetable, ¼ cup red/orange vegetable, and ⅛ cup other vegetable for Child Nutrition Meal Pattern Requirements. (Use of this logo and statement authorized by the Food and Nutrition Service, USDA XX/XX).</p> <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 5px;"> CN CN </div> </div>	<div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> CN 099135 </div> <p style="margin: 0;">Each 4.5 oz. Chicken Stir-Fry Bowl provides 1.5 oz. equivalent meat, 1.0 oz eq Grains, ¼ cup dark green vegetable, ¼ cup red/orange vegetable, and ⅛ cup other vegetable for Child Nutrition Meal Pattern Requirements. (Use of this logo and statement authorized by the Food and Nutrition Service, USDA XX/XX).</p> <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 5px;"> CN CN </div>
<p>Net Wt.: 18 pounds</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 20px;"> <div style="text-align: center;"> <p>Chicken Wok Company 1234 Kluck Street</p> </div> <div style="text-align: center;">  <p>Poultry, PA 12345</p> </div> </div>	

Main Dish

Healthier Kansas Recipe 128
Iowa Gold Star

White Chicken Chili Recipe

HACCP: #2 Same Day Service

Ingredients	100 Servings		Servings		Preparation Instructions
	Weight	Measure	Weight	Measure	
Onions, yellow, AP Garlic, fresh, minced Chicken, cooked, diced Great Northern Beans, canned, low-sodium, undrained Water Chicken Base, low-sodium White Pepper Cumin, ground	3 lb 8 oz 5 oz 10 lb 17 oz 4 oz 2 oz	3 ¼ #10 cans 3 Tbsp			1. In a steam jacketed kettle, combine chopped onions, garlic, chicken, beans with liquid, water, chicken base, white pepper, and ground cumin. 2. Simmer for 10 minutes to blend flavors, stirring occasionally.
Green Chili Peppers, canned, diced Chicken Stock, prepared from low-sodium base	15 oz	1 gal + 2 qt + 1 cup (as prepared)			3. Add green chili peppers. 4. Add prepared chicken stock and simmer for 10 minutes. Final product should be 4 gallons + 2 ¾ quarts. Adjust with extra chicken stock if needed. CCP: Heat to 165 °F or higher for 15 seconds. 5. Pour into serving pans. Portion with 6 oz ladle (K-8) or 8 oz ladle (9-12). CCP: Hold for hot service at 135 °F or higher.
Mozzarella Cheese, part skim, shredded	3 lb 2 oz				6. Top chili with ½ oz mozzarella cheese.

Serving Size	1 Serving Provides		Yield
	2 oz equivalent M/MA and ¼ cup vegetable, Beans, Peas, and Lentils		
¾ cup (6 oz spoodle)			K-8: 100 servings

K–8 Sample Lunch Menu

Notes: Garden Bar & Vegetable Offerings <ul style="list-style-type: none"> • Leafy Greens (1 cup = ½ cup serving) • Vegetables (½ cup unless otherwise noted) • Fruits (½ cup) • All lunches include a choice of low-fat (1%) or fat-free fluid milk (1 cup). 				
Monday	Tuesday	Wednesday	Thursday	Friday
Lentils of the Southwest (2 oz eq M/MA) Carrot Coins WG Roll (2 oz eq) Garden Bar Romaine/Spinach, Celery, Tomatoes, Vegetarian Baked Beans Peaches Fresh Banana	Chicken Stir-fry Bowl (1 ½ oz eq M/MA + 1 oz eq Grain + ⅝ cup Vegetable) Roasted Corn Garden Bar Romaine, Garbanzo Beans, Baby Carrots, Cucumber Mandarin Oranges Fresh Apples	Beef & Pinto Bean Taco Salad (Shredded Romaine/Spinach w/ 1 oz eq Beef, 1 oz eq Cheese, & ⅛ cup Pinto Beans (Vegetable)) Whole Grain Pita Chips (2 oz eq) Garden Bar Romaine, Celery, Cabbage/Carrot Slaw (¼ cup Cabbage, ⅛ cup Carrot), Tomato Salsa Pineapple Tidbits Fresh Kiwi	White Chicken Chile (2 ¼ M/MA oz eq + ¼ cup Vegetable) WG Roll (2 oz eq) Romaine Salad (Romaine, ¼ cup Tomatoes, ¼ cup Cucumbers) Mixed Fruit Fresh Orange Smiles	Crispy Fish Taco (1 oz eq M/MA + 1 oz eq WG) on WG Tortilla (1 oz eq) Cabbage (¼ cup) Sweet Potato Fries Garden Bar Romaine/Spinach, Salsa, Cucumbers, Garbanzo Beans Pears Fresh Fruit Salad (Bananas, Apples, Oranges, Kiwi)

Note: Green leafy vegetables serving sizes were determined using this equivalent: 1 cup = ½ cup serving. The serving size listed on the menu represents the necessary portion for a ½ cup serving.

WG refers to whole grain.

Vegetables K–8 Menu

Instructions: In the Participant's Workbook, locate the **Sample CN Label** handout, the **White Chicken Chili Recipe** handout, and the **K–8 Sample Lunch Menu** handout. Review the menu items. Identify the name of all the vegetables, portion sizes, and the appropriate vegetable subgroup. Record your answers in the appropriate vegetable subgroup column. Answers for fresh dark green leafy vegetables should be recorded in the creditable serving size such as $\frac{1}{2}$ cup. Monday has been completed as an example.

Day	Dark Green Servings	Red/Orange Servings	Beans, Peas, and Lentils Servings	Starchy Servings	Other Servings
Monday	Romaine and Spinach $\frac{1}{2}$ cup	Carrot Coins $\frac{1}{2}$ cup Tomatoes $\frac{1}{2}$ cup	Vegetarian Baked Beans $\frac{1}{2}$ cup		Celery $\frac{1}{2}$ cup
Tuesday	Stir-fry (CN Label) $\frac{1}{4}$ cup Dark Green Romaine $\frac{1}{2}$ cup	Stir-fry (CN Label) $\frac{1}{4}$ cup Baby Carrots $\frac{1}{2}$ cup	Garbanzo Beans $\frac{1}{2}$ cup	Corn $\frac{1}{2}$ cup	Stir-fry (CN Label) $\frac{1}{8}$ cup Cucumbers $\frac{1}{2}$ cup
Wednesday	Romaine and Spinach $\frac{1}{2}$ cup	Carrots $\frac{1}{8}$ cup Tomato Salsa $\frac{1}{2}$ cup	Pinto Beans $\frac{1}{8}$ cup		Celery $\frac{1}{2}$ cup Cabbage $\frac{1}{4}$ cup
Thursday	Romaine $\frac{1}{2}$ cup	Tomatoes $\frac{1}{4}$ cup	Great Northern Beans (Recipe) $\frac{1}{4}$ cup		Cucumbers $\frac{1}{4}$ cup
Friday	Romaine and Spinach $\frac{1}{2}$ cup	Sweet Potato Fries $\frac{1}{2}$ cup Tomato Salsa $\frac{1}{2}$ cup	Garbanzo Beans $\frac{1}{2}$ cup		Cabbage $\frac{1}{4}$ cup Cucumbers $\frac{1}{2}$ cup
Total Servings	$3 \frac{1}{4}$ cups	$3 \frac{5}{8}$ cups	$1 \frac{7}{8}$ cups	$\frac{1}{2}$ cup	$2 \frac{7}{8}$ cups

Note: Answers are in bold.

GRAINS REQUIREMENTS FOR SCHOOL MEALS

Objective: Identify the school lunch and breakfast grains component requirements.

SHOW SLIDE: School Lunch Grains Requirements

SAY: The grains component is a required meal component for a reimbursable lunch meal. Let's review the grade groups, the daily minimum grains requirements, and the weekly minimum grains requirements for lunch.

Reimbursable School Lunch Grains Component		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements Offered
Grades K–5	1 ounce equivalent	8–9 ounce equivalents
Grades 6–8	1 ounce equivalent	8–10 ounce equivalents
Grades 9–12	2 ounce equivalents	10–12 ounce equivalents
Schools are only required to meet the daily and weekly minimum requirements for this meal component. To meet the minimum weekly requirements, grades K–5, grades 6–8, and grades 9–12 will need to offer more than the minimum daily requirements on some days during the week.		

At least 80% of the grains served in school lunch and breakfast per week must be whole grain-rich (containing at least 50% whole grains).

DO: Review the grade group, the daily minimum grains requirement, and the weekly minimum grains requirements for lunch.

SHOW SLIDE: School Breakfast Grains Requirements

SAY: The grains component is a required component for a reimbursable breakfast meal. Let's review the grade groups, the daily minimum grains requirements, and the weekly minimum grains requirements for breakfast.

Reimbursable School Breakfast Grains Component		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements
Grades K–5	1 ounce equivalent	7–10 ounce equivalents
Grades 6–8	1 ounce equivalent	8–10 ounce equivalents
Grades 9–12	1 ounce equivalent	9–10 ounce equivalents
Schools are only required to meet the daily and weekly minimum requirements for this meal component. To meet the minimum weekly requirements, grades K–5, grades 6–8, and grades 9–12 will need to offer more than the minimum daily requirements on some days during the week.		

At least 80% of the grains served in school lunch and breakfast per week must be whole grain-rich (containing at least 50% whole grains).

DO: Review the grade groups, the daily minimum grains requirements, and the weekly minimum grains requirements for breakfast.

SHOW SLIDE: Grains Component**ACTIVITY: Grains Component**

Materials: Grains Component Requirements handout

Time: 5 minutes

Instructions: Have participants refer to the **Grains Component Requirements** worksheet located in the Participant's Workbook. At the end of the activity, review the answers located in the Appendix of the Participant's Workbook.

Grains Component Requirements

Instructions: Answer the corresponding questions.

Are grains a required meal component for both breakfast and lunch?

Yes, grains are a required meal component for all grades levels for both breakfast and lunch.

Do all grade levels have the same daily requirements for reimbursable lunch? If not, what are they?

No. Grades K–5 and Grades 6–8 have a minimum requirement of 1 ounce equivalent per day at lunch. Grades 9–12 have a minimum requirement of 2 ounce equivalents per day at lunch. For all grades, more than the minimum requirements will need to be offered on some days to meet the minimum weekly requirements.

Do all grade levels have the same daily requirements for reimbursable breakfast? If not, what are they?

Yes. All grade levels have a minimum requirement of 1 ounce equivalent per day at breakfast. For all grades, more than the minimum meal requirements will need to be offered on some days to meet the minimum weekly requirements.

At least 80% of the grains served in school lunch and breakfast per week must be whole grain-rich (containing at least 50% whole grains).

MEATS/MEAT ALTERNATES REQUIREMENTS FOR SCHOOL MEALS

Objective: Identify the school lunch meats/meat alternates (M/MA) component requirements.

SHOW SLIDE: School Lunch Meats/Meat Alternates (M/MA) Requirements

SAY: The meats/meat alternates component is a required meal component for a reimbursable lunch but is not a required meal component at breakfast. In order for a food to contribute to the M/MA component, it must contain a minimum of 0.25 oz of a M/MA. Let's review the grade groups the daily minimum meats/meat alternates requirements, and the weekly minimum meats/meat alternates requirements for lunch.

Reimbursable School Lunch Meats/Meat Alternates Components		
	Daily Minimum Requirements Offered	Weekly Minimum Requirements Offered
Grades K–5	1 ounce equivalent	8–10 ounce equivalents
Grades 6–8	1 ounce equivalent	9–10 ounce equivalents
Grades 9–12	2 ounce equivalents	10–12 ounce equivalents
Schools are only required to meet the daily and weekly minimum requirements for this meal component. To meet the minimum weekly requirements, grades K–5, grades 6–8, and grades 9–12, will need to offer more than the minimum daily requirements on some days during the week.		

DO: Review the grade groups, the daily minimum meats/meat alternates requirements, and the weekly minimum grains requirements for lunch.

SHOW SLIDE: Beef, Fish, and Poultry

SAY: One ounce cooked, skinless, unbreaded portion of beef, fish, and poultry equals one ounce of the meats/meat alternates requirement.

SHOW SLIDE: Nuts and Seeds

SAY: Nuts and seeds and their butters listed in USDA, Food and Nutrition Service (FNS) guidance are nutritionally comparable to meat or other meat alternates based on available nutritional data. Nuts or seeds such as sunflower seeds, almonds, walnuts, and hazelnuts may be used to meet the full meats/meat alternates component. Acorns, chestnuts, and coconuts are excluded and shall not be used as a meat alternate due to their low protein content.

SHOW SLIDE: Nut Butter

SAY: Nut and seed butters may be used to meet the full meats/meat alternates requirement. Examples include almond butter, cashew nut butter, peanut butter, reduced fat peanut butter, sesame seed butter, soy nut butter, and sunflower seed butter. Two tablespoons of nut or seed butter equal one ounce equivalent of the meats/meat alternates requirement.

SHOW SLIDE: Tofu

SAY: Tofu is widely recognized as a meat substitute and can easily be included in the school meal. Commercially prepared tofu must be 2.2 ounces (by weight) with 5 or more grams of protein to equal one ounce of the meats/meat alternates requirement. Four ounces (weight) or ½ cup (volume) of soy or dairy yogurt equals one ounce equivalent of the meats/meat alternates requirement.

SHOW SLIDE: Crediting Tofu

SAY: Tofu is being used to produce other meat substitute products such as links which are easily recognizable as meat substitutes and can be credited as such. When considering processed products such as links and sausages made from tofu as meat alternates for the reimbursable meal, the tofu ingredient must contain the required 5 grams of protein or more, which is not shown on a nutrition facts panel. A 2.2 ounce serving (¼ cup) of commercially prepared tofu containing at least 5 grams of protein equals one ounce equivalent of meats/meat alternates. The most appropriate way to ensure that the product meets FNS requirements is to request that the product be manufactured under the CN Labeling Program following a federally approved quality control program.

SHOW SLIDE: Firm or Extra Firm Tofu

SAY: Firm or extra firm tofu in stir-fries, omelets, and miso soup may credit toward the meat alternates component. Meat substitute products such as links and sausages made from tofu are also easily recognizable as meat substitutes and can be included in a meal.

SHOW SLIDE: Soft or Silken Tofu

SAY: Soft or silken tofu that is incorporated into drinks, such as smoothies, or other dishes to add texture or improve nutrition, such as in baked desserts or soups, does not credit because it is not recognizable and does not represent a meat substitute. Therefore, the blended tofu is not creditable. Finally, noodles made from tofu do not represent a meat substitute and are not composed of grains. This explains why the noodles are not credited for either component.

SHOW SLIDE: Yogurt

SAY: Yogurt may be used to meet all or part of the meats/meat alternates component. Yogurt may be plain or flavored, unsweetened or sweetened. Non-commercial and/or non-standardized yogurt products, such as frozen yogurt, drinkable yogurt products, homemade yogurt, yogurt flavored products, yogurt bars, yogurt covered fruits and/or nuts, or similar products are not creditable. Soy yogurt is now also creditable. Four ounces (weight) or ½ cup (volume) of soy or dairy yogurt equals one ounce of the meats/meat alternates requirement.

SHOW SLIDE: Cheese and Eggs

SAY: Other meat alternates, such as cheese and eggs, may be used to meet all or part of the meats/meat alternates component in accordance with FNS guidance. A one ounce portion of cheese credits as one ounce meats/meat alternates equivalent. Eggs may be used to meet the entire or partial requirement for the M/MA component. Whole eggs are expressed in large egg equivalents (1 large egg = 2 oz equivalent meat alternate) and ½ large egg equivalent (½ large egg = 1 oz equivalent meat alternate).

SHOW SLIDE: Beans, Peas, and Lentils

SAY: The term beans, peas, and lentils refers to the harvesting process of allowing the bean or pea to “mature” or “dry” on the plant before harvesting; it does not refer to the “as purchased” form of the bean. “Immature” or “fresh” beans or peas can be credited as starchy vegetables. A variety of dry beans/peas are available through the USDA Foods program which may be incorporated into entrees, side dishes, or salad bars. Many canned or frozen beans or peas are actually dry beans and peas that have been cooked and subsequently canned or frozen, and are therefore acceptable. A ¼ cup of cooked beans, peas, and lentils must be served to equal one ounce of M/MA.

SHOW SLIDE: “Immature” or “Fresh” Beans or Peas

SAY: Beans and peas that are not allowed to mature on the plant before harvesting are often referred to as, “immature” or “fresh” and do not qualify as dry beans or peas for the lunch meal pattern criteria. Immature lima beans and field and green peas are examples of beans and peas that are not allowed to dry on the plant before harvest and therefore do not qualify as “dry beans and peas.” “Immature” or “fresh” beans or peas can be credited as starchy vegetables.

SHOW SLIDE: Meat Alternates or Vegetables

SAY: Dry/mature beans and peas may be offered as meat alternates or as vegetables at the discretion of the menu planner. However, one serving of the same type of bean or peas cannot count toward both meal components in the same meal. For example, one serving of refried beans can be offered as a vegetable in one meal and as a meats/meat alternates on another occasion. In this example, the refried beans offered as a vegetable count toward the weekly beans/peas requirement, but not toward the meats/meat alternates weekly range. Menu planners must determine in advance how to count beans/peas in a meal.

SHOW SLIDE: Cooked Beans

SAY: A ¼ cup of cooked beans equals one ounce of the meats/meat alternates requirement. If with liquid, there should be more than ¼ cup of beans and liquid. The liquid does not count as beans.

SHOW SLIDE: Shelf-Stable, Dried, Semi-Dried Meat, Poultry, Seafood Snacks

SAY: Dried meat products may now be used throughout CNPs as part of reimbursable meals or snacks at the discretion of the program operators. In order to simplify meal planning for operators, use of the products is not limited to meals and snacks served off-site. To credit these products, program operators will follow the crediting principles used for all other products made from meat, poultry, or seafood. For more information, see the Food Buying Guide for CNPs at www.fns.usda.gov/tn/food-buying-guide-for-child-nutrition-programs and the Manufacturer's Product Formulation Statement section of the CN Labeling Program website (www.fns.usda.gov/cnlabeling/food-manufacturersindustry).

SHOW SLIDE: Qualifying Beans, Peas, and Lentils

ACTIVITY: Qualifying Beans, Peas, and Lentils

Materials: Qualifying Beans, Peas, and Lentils handout

Time: 10 minutes

Instructions: Have participants identify if the picture is a legume when you read the name of the picture. Provide the correct response after the participants have provided feedback. At the end of this activity refer participants to the **Qualifying Beans, Peas, and Lentils** handout located in the Participant's Workbook.

SAY: Some foods commonly referred to as beans and peas (e.g., green peas, green lima beans, and green beans) are not considered part of the beans, peas, and lentils subgroup because their nutrient profile is dissimilar. We are going to look at some pictures and decide if the pictures represent a legume.

DO: Read the name of the picture to the participants and ask them to identify if the picture is a legume (beans, peas, and lentils). Provide the correct response after the participants have provided feedback. At the end of this activity refer participants to the **Qualifying Beans, Peas, and Lentils** handout located in the Participant's Workbook.

Qualifying Beans, Peas, and Lentils

Bean Products, dehydrated, refried beans

Bean Products, dry beans, canned, beans baked or in sauce with pork

Bean Products, dry beans, canned, beans with bacon in sauce

Bean Products, dry beans, canned, beans with frankfurters in sauce

Bean Products, dry beans, canned; beans, baked or in sauce, vegetarian, includes USDA Foods

Bean Products, dry beans, canned; refried beans, includes USDA Foods

Bean soup, dry beans, canned, condensed, (1 part soup to 1 part water)

Bean soup, dry beans, canned, ready-to-serve

Beans, black, (Turtle beans), dry, canned, whole, includes USDA Foods

Beans, black, (Turtle beans), dry, whole

Beans, black-eyed (or peas), dry, canned, whole, includes USDA Foods

Beans, black-eyed (or peas), dry, whole, includes USDA Foods

Beans, garbanzo or chickpeas, dry, canned, whole, includes USDA Foods

Beans, garbanzo or chickpeas, dry, whole

Beans, great northern, dry, canned, whole, includes USDA Foods

Beans, great northern, dry, whole, includes USDA Foods

Beans, kidney, dry, canned, whole, includes USDA Foods

Beans, kidney, dry, whole, includes USDA Foods

Beans, lima, dry baby, whole, includes USDA Foods

Beans, lima, dry, canned, green, whole, includes USDA Foods

Beans, lima, dry, fordhook, whole

Beans, mung, dry, whole

Beans, navy or pea, dry, whole, includes USDA Foods

Beans, pink, dry, canned, whole, includes USDA Foods

Beans, pink, dry, whole, includes USDA Foods

Beans, pinto, dehydrated

Beans, pinto, dry, canned, whole, includes USDA Foods

Beans, pinto, dry, whole, includes USDA Foods

Beans, red, small, dry, canned, whole, includes USDA Foods

Beans, red, small, dry, whole, includes USDA Foods

Beans, soy, edamame

Beans, soy, dry, canned, and shelled

Beans, soy, dry, shelled

Lentils, dry

Pea soup, dry peas, canned, condensed, (1 part soup to 1 part water), includes cream of pea soup

Pea soup, dry peas, canned, ready-to-serve

Peas, dry, split

Peas, dry, whole

FLUID MILK REQUIREMENTS FOR SCHOOL MEALS

Objective: Identify the school lunch and breakfast fluid milk component requirements.

SHOW SLIDE: *Fluid Milk Requirements*

SAY: The fluid milk requirement is the same for both lunch and breakfast. The weekly minimum amount of 5 cups of milk may be met by offering the daily minimum of one cup. Only fat-free and low-fat (1%) flavored or unflavored milk may be offered as part of the reimbursable meal for children in grades K–12.

ACTIVITY: Fluid Milk Requirements

Materials: none

Time: 5 minutes

Instructions: Ask participants what the requirements are for fluid milk for breakfast and lunch. Allow participants to respond.

ASK: What are the fluid milk requirements for breakfast and lunch?

FEEDBACK: The fluid milk requirement is the same for both lunch and breakfast. The weekly minimum amount of 5 cups of milk may be met by offering the daily minimum of one cup. Only fat-free and low-fat (1%) milk may be offered as part of the reimbursable meal for children in grades K–12. Schools may offer flavored low-fat milk (1%) in addition to unflavored low-fat milk and flavored or unflavored nonfat milk.

SHOW SLIDE: **Milk Substitutions**

SAY: Required (meal modifications) and optional (parent requested) milk substitutes are considered meal exceptions and are not subject to this final rule. Milk substitutes must meet the regulatory standards outlined in 7 CFR 210.10(d)(3), which do not address fat or flavor/sugar restrictions. However, milk substitutes offered as part of the reimbursable meal must be included in weighted nutrient analysis, which are subject to the overall weekly average fat limit and calorie ranges. USDA does expect milk substitutes are offered frequently enough to have a significant impact on the overall nutrient analysis.

SHOW SLIDE: **“Plain” Potable Water**

SAY: Schools participating in the NSLP must make "plain" potable water available to children at no charge in the place where lunch meals are served during the meal service. There are a variety of ways that schools can implement this requirement. For example, schools can offer water pitchers and cups on lunch tables, a water fountain, or a faucet that allows students to fill their own bottles or cups with drinking water. Whatever solution is chosen, the water must be available without restriction in the location where meals are served. Schools should be working toward developing a reasonable method to implement this requirement.

While "plain" potable water is required to be made available to students, it is not considered part of the reimbursable meal and students are not required to take water. There is no separate funding available for this provision and reimbursement may not be claimed. However, reasonable costs associated with providing "plain" potable water would be an allowable cost to the non-profit foodservice account. For additional information, refer to SP26-2011.

Instructor's Note: Allow 2–3 minutes in order to share best practices or strategies related to this topic.

SHOW SLIDE: **Coconut, Hominy, Popcorn, Surimi Seafood, and Tempeh**

SAY: FNS will allow program operators to credit the following food items that have not previously contributed to the CNP meal pattern requirements: coconut, hominy, popcorn, surimi seafood, and tempeh. FNS will issue new guidance describing how these products will credit toward specific meal components in the CNP meal patterns. FNS will also publish new guidance to allow crediting vegetables disguised as other meal components or not provided in traditional forms, for example, noodles or pasta made from vegetables, including beans, peas, and lentils.

We have covered the information on the components for a reimbursable lunch and breakfast. The next topic we are going to cover is Offer Versus Serve (OVS).

REIMBURSABLE OVS LUNCH MEALS

Objective: Recognize an Offer Versus Serve (OVS) reimbursable lunch meal.

SHOW SLIDE: Offer Versus Serve (OVS) Concept

SAY: Offer Versus Serve (OVS) is a concept that applies to menu planning and the meal service. OVS allows students to decline some of the food offered in a reimbursable lunch or breakfast, in order to reduce food waste. Since students may choose fewer selections under OVS, guidance is provided on what constitutes a reimbursable lunch and breakfast. In order to be successful at the point of service, schools are encouraged to conduct training for cashiers and serving line staff so they can help students select reimbursable lunches and breakfasts.

SHOW SLIDE: OVS

SAY: At the senior high school level, OVS is required at lunch unless the school or school food authorities (SFAs) demonstrates to the State agency that their system does not accommodate OVS.

- OVS is optional for SFAs providing meals through the at-risk afterschool meals component of the Child and Adult Care Food Program (CACFP).
- OVS is also optional for summer meals offered by SFAs through the Summer Food Service Program or the Seamless Summer Option under the NSLP.
- When used for these programs, SFAs must follow the applicable requirements outlined in this guidance. OVS cannot be used for snacks in any program. OVS only applies to the student's daily selections of a reimbursable lunch or breakfast.

SHOW SLIDE: Planned, Offered, and Selected

SAY: Planned: A planned menu is what the menu planner intends to offer to students. It represents the SFA's calculation of the items that will need to be prepared for a school's usual average daily participation. Ideally, the planned and offered meals are the same.

Offered: An offered menu is what is actually prepared and set out on the serving lines for students. Offered menus may differ from planned menus because, for example, a planned food item was not received from the distributor and the menu planner had to offer a different food item.

Selected/Served: Selected or served refers to the foods that were actually served to, or selected by, students. Menu planners should use selected/served food item data to inform future menu planning (production records should be updated based on this data to reflect serving trends) and reduce food waste (i.e., so the school does not offer items that students do not select).

SHOW SLIDE: OVS Lunch

SAY: For lunch under OVS, all students, at any grade level must select a minimum of three meal components to have a creditable reimbursable lunch. One of the choices selected must be at least a $\frac{1}{2}$ cup serving of fruit or vegetable or a $\frac{1}{2}$ cup total serving of both fruit and vegetable. If $\frac{1}{2}$ cup of fruit is selected, the student must select the minimum required daily serving of the vegetable component to have both credited as components for a reimbursable lunch. For example, if a K–8 grade student selects $\frac{1}{2}$ cup of the fruit component and $\frac{3}{4}$ cup of vegetable component, the student would need to select a minimum of one additional meal component for a reimbursable OVS lunch meal.

SHOW SLIDE: Extra Foods, Extra Calories

SAY: Extra foods may be offered but do not credit toward the minimum number of meal components/food items for reimbursable meals or for students' selections under OVS. This extra food may be selected by the student in addition to the meal, but may not credit toward the minimum number of meal components/food items a school is required to offer under OVS or that a student must select. However, these extra foods must be included in a nutrient analysis to assess compliance with the weekly dietary specifications (calories, saturated fat, and sodium).

SHOW SLIDE: Selecting Additional Fruits and Vegetables

SAY: For OVS purposes, if the menu planner allows students to select more than the minimum required daily serving of fruits or vegetables (such as from a salad bar), the component is credited only once. Menu planners may allow students to select more than the minimum required daily serving, as long as the weekly dietary specifications for calories, saturated fat, and sodium are not exceeded with the additional food offered.

SHOW SLIDE: Fruit and Vegetable Components for Lunch

SAY: To be credited as part of a reimbursable lunch for OVS, the minimum quantity a student must select is:

- $\frac{1}{2}$ cup of vegetables or
- $\frac{1}{2}$ cup of fruits or
- $\frac{1}{2}$ cup of an item with both fruits and vegetables (e.g., a carrot/raisin salad) or
- Two $\frac{1}{4}$ cup servings of either the same or a different fruit or vegetable

SHOW SLIDE: Fruits and Vegetables

SAY: If a student **does not select at least a $\frac{1}{2}$ cup serving total** of fruits and/or vegetables, the lunch is not reimbursable, even if he/she has three other components (e.g., meats/meat alternates, grains, and/or milk).

Lunch Not Reimbursable



Cashiers should allow these students to select fruits or vegetables from the serving line or have these items available at the point of service. If the student still does not select at least a ½ cup serving of fruits and/or vegetables, the meal is not reimbursable. The school may charge the student à la carte prices for the foods selected.

SHOW SLIDE: *Fruit and Vegetable Lunch Scenarios*

SAY: For example, if a 5th grade student selects only 2 cups of fruit:

Lunch Not Reimbursable



Or if a 10th grade student makes a salad with only three cups of vegetables:

Lunch Not Reimbursable



SAY: Both students have exceeded the minimum required daily serving for lunch. In each of these scenarios, the students must still select at least two other components. Remember under OVS, all students at any grade level **must select at least 3 of the 5 meal components** for lunch.

SHOW SLIDE: *Selecting Three Components*

SAY: For OVS, if a 10th grade student selects only three components and two of these are a fruit and a vegetable, the student must select the minimum required daily serving for either the fruit or vegetable to have both credited as two separate components. In other words, a 10th grader who selects ½ cup of fruit and ½ cup of vegetables and milk **does not have a reimbursable meal.**

Lunch Not Reimbursable



Either the fruit or vegetable selection must be at least one cup to credit it as a component. Alternately, the student could select a grain or meats/meat alternates choice as the third component, instead of more fruits or vegetables.

SHOW SLIDE: *K–8 Lunch Speed Round*

ACTIVITY: K–8 Lunch Speed Round

Materials:

- **K–8 Lunch Speed Round** worksheet
- Slide presentation

Time: 5 minutes

Instructions: Have participants review the pictures on the **K–8 Lunch Speed Round** worksheet and record their answer. At the end of the activity, review the answers located in the Appendix of the Participant's Workbook.

SAY: For the next few minutes, we are going to practice being a cashier. The previous activities have prepared you for the speed round. You will be shown a series of K–8 Lunch Speed Round Slides, and you will have three seconds (about the same amount of time you have at school) to recognize whether or not a selected OVS meal is reimbursable. Use the **K–8 Lunch Speed Round** worksheet located in the Participant's Workbook.

DO: Review the instructions located on the **K–8 Lunch Speed Round** worksheet. Show the **K–8 Lunch Speed Round** slide presentation and have the participants record their answers. Discuss the participants' answers to the speed round. At the end of the activity, review the answers located in the Appendix of the Participant's Workbook.

K–8 Lunch Speed Round

Instructions: Review the following pictures and determine if the items represent a K–8 reimbursable lunch meal.




K–8 Lunch Speed Round 1 Answer

	<p>Grilled Chicken Wrap 2 oz eq Meats/Meat Alternates</p> <p>WG Tortilla 2 oz eq Grains</p> <p>Vegetables $\frac{1}{8}$ cup Red/Orange Vegetable $\frac{1}{8}$ cup Beans, Peas, and Lentils</p>
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Not Reimbursable Meal

- Only $\frac{1}{4}$ cup Vegetables
- Must be $\frac{1}{2}$ cup for a reimbursable meal

K–8 Lunch Speed Round 2 Answer

  	<p>Tossed Salad $\frac{1}{2}$ cup Dark Green Vegetable $\frac{1}{2}$ cup Red/Orange Vegetable</p> <p>Broccoli $\frac{3}{4}$ cup Dark Green Vegetable</p> <p>Fresh Orange $\frac{1}{2}$ cup Fruit</p>
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Not Reimbursable Meal

- Only two meal components selected
- Must be another component for a reimbursable meal

K–8 Lunch Speed Round 3 Answer



  	<p>Milk 1 cup Milk</p> <p>Vegetarian Chili 2 oz Meats/Meat Alternates $\frac{1}{4}$ cup Red/Orange Vegetable</p> <p>WG Crackers 1 oz eq Grain</p>
---	---

Not Reimbursable Meal

- Only $\frac{1}{4}$ cup Vegetables
- Must be $\frac{1}{2}$ cup for a reimbursable meal

K-8 Lunch Speed Round, continued

K-8 Lunch Speed Round 4 Answer

   	<p>Hamburger on a WG Bun 2 oz Meats/Meat Alternates 1½ oz eq Grains</p> <p>Carrots ½ cup Red/Orange Vegetable</p> <p>Bean Salad ½ cup Beans, Peas, and Lentils ¼ cup Other Vegetable</p> <p>Milk 1 cup Milk</p>
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Reimbursable Meal

K-8 Lunch Speed Round 5 Answer

 	<p>Hummus 2 oz Meats/Meat alternates</p> <p>WG Pita 1 oz eq Grain</p> <p>Bean Salad ½ cup Beans, Peas, and Lentils ¼ cup Other Vegetable</p>
--	---

Reimbursable Meal

K-8 Lunch Speed Round 6 Answer

 	<p>Fish Taco 2 oz Meats/Meat Alternates</p> <p>WG Tortilla 1 oz eq Grain</p> <p>Cole Slaw ¼ cup Other Vegetable</p> <p>Milk 1 cup Milk</p>
---	--

Not Reimbursable Meal

• Only ¼ cup Vegetables

• Must be ½ cup for a reimbursable meal


K-8 Lunch Speed Round, continued

K-8 Lunch Speed Round 7 Answer

  	<p>WG Spaghetti and Marinara 1 oz eq Grain ¼ cup Red/Orange Vegetable</p> <p>Broccoli ¼ cup Dark Green Vegetable</p> <p>Fresh Orange ½ cup Fruit</p>
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Reimbursable Meal

K-8 Lunch Speed Round 8 Answer

  	<p>Milk 1 cup Milk</p> <p>WG Spaghetti and Meatballs 2 oz Meats/Meat Alternates 1 oz eq Grain ¼ cup Red/Orange Vegetable</p> <p>WG Roll 1 oz eq Grain</p>
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Not Reimbursable Meal

- **Only ¼ cup Vegetables**
- **Must be ½ cup for a reimbursable meal**

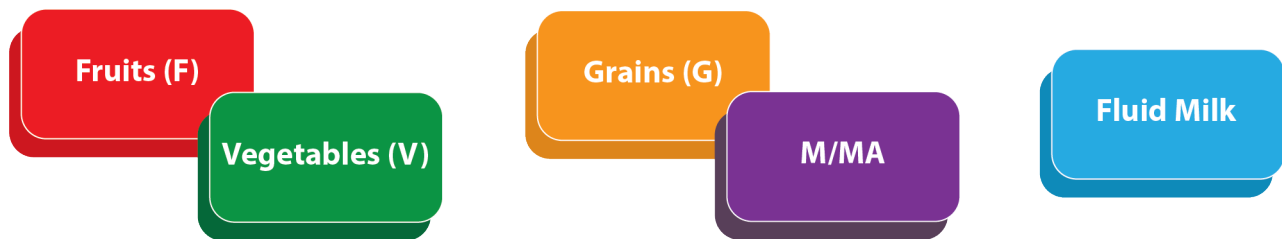
REIMBURSABLE OVS BREAKFAST MEALS

Objective: Recognize an OVS reimbursable breakfast meal.

SHOW SLIDE: Meal Components for OVS Breakfast

SAY: As we discussed earlier, the meal components that must be offered in a reimbursable breakfast include:

- Fruits (or vegetables as a substitute)
- Grains and/or meats / meat alternates
- Fluid Milk



SHOW SLIDE: OVS Breakfast

SAY: Under OVS, at least four food **items** must be offered. Remember food items are choices within a component. For example, food items for the fruit component might include grapes, peaches, or pears. All students, at any grade level, must select:

- At least three food items
- The minimum required daily serving for grains and/or meats / meat alternates and milk
- At least $\frac{1}{2}$ cup of fruit or vegetables or fruit/vegetable combined

SHOW SLIDE: OVS Breakfast Choices

SAY: Except for selecting a $\frac{1}{2}$ cup of fruit, it is the student's choice to select or decline food items. The menu planner determines how to offer food items, which may affect the selections a student can make to build a reimbursable breakfast. Remember, the cashier is responsible for following the intent of the menu and ensuring students select a reimbursable meal. Just like in lunch meal planning, if choices of food items within the components are offered, the menu planner must indicate what choices or combination of choices the student may select including any minimum or maximum number that may be taken.

SHOW SLIDE: Example Breakfast Choices for the Fruit Component

SAY: For example, if four $\frac{1}{2}$ cup servings (e.g., grapes, peaches, pears, and fruit salad) are offered for the fruit component, the menu planner, server, and cashier must allow the student to select at least a full cup; but must also indicate that only one $\frac{1}{2}$ cup of fruit is required for a

reimbursable breakfast under OVS. If the menu planner chooses, under this example, the student could be allowed to take up to all four choices offered. This example reminds us of the important role the menu planner has to identify the clear messages, and the important role the cashier has to serve the meal as intended by the menu planner.

SHOW SLIDE: Combination Foods

SAY: The menu may offer a combination food that contains more than one food item that cannot be separated, such as a pre-plated waffle with fresh fruit topping. In this example, if the student only wanted the waffle, the student would not be able to decline the fruit, even if the student has no intent to consume it. Other examples of combination breakfast choices that cannot be separated may include a yogurt parfait, a breakfast burrito, or a milk/fruit smoothie.

SHOW SLIDE: Smoothies

SAY: Smoothies with fruit, vegetables, or fruit/vegetable combined and milk are another popular combination food offered at lunch and breakfast. If there is at least 1 cup of milk and at least $\frac{1}{2}$ cup of fruit/vegetable juice in the smoothie, the smoothie may count as two food items for purposes of OVS. Fruit, vegetable, or fruit/vegetable smoothies may also be made with yogurt. A student would need to select one additional food item in order to have three total items and a breakfast reimbursable meal.

SHOW SLIDE: Grains and/or Meats/Meat Alternates

SAY: Schools may offer grains and/or meats / meat alternates to meet the minimum ounce equivalent in this combined meal component requirement.

- Schools may offer grains and/or meats / meat alternates to meet the combined component requirement based on ounce equivalents.
- The minimum daily requirement (1.0-ounce equivalent) and minimum weekly requirements (7.0–9.0 ounce equivalents, depending on the age/grade group) remain the same.
- Schools can meet the daily and weekly requirements by offering grains and/or meats / meat alternates.

SAY: We have covered several different factors to consider when implementing OVS in the School Breakfast Program. In the next activity, we are going to review different breakfast menu options and determine how food items should be credited in these specific examples.

SHOW SLIDE: Breakfast Scenarios**ACTIVITY: Breakfast Scenarios**

Materials: Breakfast Scenarios worksheet

Time: 10 minutes

Instructions: Have participants refer to the following scenarios on the **Breakfast Scenarios** worksheet located in the Participant's Workbook. Divide the participants into small groups. Allow time for the participants to complete the activity and discuss possible responses. At the end of the discussion, include responses noted on the answer keys that were not included in the discussion. Review the answers located in the Appendix of the Participant's Workbook.

- Four Food Items Breakfast Menu Example
- Five Food Items Breakfast Menu Example
- Combination Food Breakfast Menu Example
- Grains and Meats/Meat Alternates Combined Component

Instructor's Note: *The purpose of this activity is to allow participants to recognize a reimbursable OVS breakfast meal. You can ask each group to complete each worksheet or assign one worksheet to different groups.*

Breakfast Scenarios

Scenario: Four Food Items Breakfast Menu Example

Instructions: Review the Four Food Items Breakfast Menu Example and answer the corresponding questions.

Four Food Items Breakfast Menu Example

Menu with 4 food items:

- | | | |
|---------------------------|-----------------|----------------|
| • Slice of toast | (1 oz eq grain) | (1 grain item) |
| • Whole grain-rich cereal | (1 oz eq grain) | (1 grain item) |
| • Orange slices | (1 cup fruit) | (1 fruit item) |
| • Variety of milk | (1 cup) | (1 milk item) |

Reimbursable breakfast meal:

- Students must select at least three food items;
- For grains and/or meats / meat alternates and milk, the student must select the minimum required daily serving.
- For the fruit component, the student must select at least $\frac{1}{2}$ cup of fruit (or vegetables if offered) or fruit/vegetable combined.

What food items can a student select for a reimbursable meal?

Possible responses: A reimbursable breakfast could consist of:

- Toast, orange slices, and milk
- Two slices of toast and the orange slices

Is the student required to select both grain food items for the items to be credited as a reimbursable breakfast under OVS?

Answer: No, a student does not have to take both grain food items offered (cereal and toast) since each item is a 1 oz equivalent and provides the minimum required daily serving.

Breakfast Scenarios, continued

Scenario: Five Food Items Breakfast Menu Example

Instructions: Review the Five Food Items Breakfast Menu Example and answer the corresponding questions.

Five Food Items Breakfast Menu Example

Menu with 5 food items:

- | | | |
|---------------------------|------------------|-----------------|
| • Whole grain-rich muffin | (2 oz eq grains) | (2 grain items) |
| • Whole grain-rich cereal | (1 oz eq grain) | (1 grain item) |
| • Orange slices | (1 cup fruit) | (1 fruit item) |
| • Variety of milk | (1 cup) | (1 milk item) |

Reimbursable breakfast meal:

- Students must select at least three food items.
- For grains and/or meats / meat alternates and milk, the student must select the minimum required daily serving.
- For the fruit component, the student must select at least $\frac{1}{2}$ cup of fruit (or vegetables if offered) or fruit/vegetable combined

What food items can a student select for a reimbursable meal?

Possible responses: A reimbursable breakfast could consist of:

- Whole grain-rich muffin, orange slices
- Whole grain-rich muffin, orange slices, milk
- Whole grain-rich cereal, orange slices, milk

Breakfast Scenarios, continued

Scenario: Combination Food Breakfast Menu Example

Instructions: Review the Combination Food Breakfast Menu Example and answer the corresponding questions.

Combination Food Breakfast Menu Example

- Waffle with fruit (1 oz eq grain + ½ cup fruit) (2 food items)

OR

- | | | |
|---------------------|------------------|----------------|
| • 2 slices of toast | (2 oz eq grains) | (2 food items) |
| • Orange slices | (½ cup fruit) | (1 food item) |
| • Apple juice | (½ cup fruit) | (1 food item) |
| • Variety of milk | (1 cup) | (1 food item) |

Reimbursable breakfast meal:

- Students must select at least three food items
- For grains and/or meats / meat alternates and milk, the student must select the minimum required daily serving.
- For the fruit component, the student must select at least ½ cup of fruit (or vegetables if offered) or fruit/vegetable combined

How many breakfast food items are featured on this menu?

Answer: The menu features five breakfast food items. For this menu, it is the menu planner's intent that a student may select either the waffle with fruit or 2 slices of toast.

What food items can a student select for a reimbursable meal?

Possible responses: A reimbursable breakfast could consist of:

- The waffle with fruit—a combination food with the minimum required daily serving for the grains component 1 oz eq the minimum required daily serving for the fruit component for OVS (½ cup), and milk
- Two slices of toast, the orange slices, and milk
- Waffle with fruit and orange slices
- Two slices of toast and orange slices

Breakfast Scenarios, continued

Scenario: Grains and Meats/Meat Alternates Combined Component Breakfast Menu Example

Instructions: Review the Grains and Meats/Meat Alternates Combined Component Breakfast Menu Example and answer the corresponding questions.

Meats/Meat Alternates in Place of Grains Breakfast Menu Example

Menu with 4 food items:

- | | | |
|---|--|---|
| <ul style="list-style-type: none"> • Slice of toast • Hard-boiled egg | <p>(1 oz eq grain)</p> <p>(1 oz eq credited as grain or meats/meat alternates)</p> | <p>(1 grain item)</p> <p>(1 grains and meats/meat alternate combined component)</p> |
| <ul style="list-style-type: none"> • Orange slices • Variety of milk | <p>(1 cup fruit)</p> <p>(1 cup)</p> | <p>(1 fruit item)</p> <p>(1 milk item)</p> |

Reimbursable breakfast meal:

- Students must select at least three food items.
- For grains and/or meats / meat alternates and milk, the student must select the minimum required daily serving.
- For the fruit component, the student must select at least ½ cup of fruit (or vegetables if offered) or fruit/vegetable combined.

If a student selects only the hard-boiled egg, orange slices, and milk, is this a reimbursable meal?

Answer: Yes, this is a reimbursable breakfast for OVS. In this example, the meats/meat alternates is offered as one of the food items for the grains and meats/meat alternates combined component. The student does not have to select both the cereal (grains) and the hard-boiled egg (meats/meat alternates) for the meats/meat alternates to be a credited breakfast item since each item is a 1 ounce equivalent and provides the minimum required daily serving.

If a student selects two servings of toast and orange slices, is this a reimbursable meal?

Answer: Yes, under OVS the student could select two servings of cereal and orange slices for a reimbursable breakfast if allowed by the menu planner. The menu planner needs to instruct the students and cashiers that this is allowed, and the signage must communicate this option.

UNIT PRICE

Objective: Discuss unit prices for a reimbursable meal.

SHOW SLIDE: Unit Price

SAY: School meals must be priced as a unit. A unit price means that one price is established for a complete reimbursable meal in the paid meal category, and one price is established for a complete reimbursable meal in the reduced price meal category.

SHOW SLIDE: Unit Price Reimbursable Meals

SAY: OVS does not affect the meal's unit price established by the SFA. Students who take three, four, or five meal components for lunch or three or more food items for breakfast pay the same price. The unit price is also not affected if the student selects the minimum required daily serving sizes for three meal components for lunch (or three food items for breakfast) and also selects less than the required serving size of additional meal components.

SHOW SLIDE: OVS and À La Carte Sales

SAY: Foods offered in reimbursable meals may also be sold à la carte. Students and cashiers need to be able to distinguish between foods considered meal components/food items in reimbursable meals and à la carte foods. If a student does not select the required meal components/food items in the required amounts, the meal is not reimbursable. Therefore, the school may charge the student à la carte prices for each item selected. Let's review a few examples and determine if the student should be charged the unit price or the à la carte price.

SHOW SLIDE: Signage

SAY: Menu planners are encouraged to offer a variety of healthy menu items to encourage students to select the foods they will eat. The NSLP regulation at 7 CFR 210.10(a)(2) requires that schools identify, near or at the beginning of serving lines, what foods constitute unit priced reimbursable meals. Schools using OVS must also identify what a student must select in order to have a reimbursable meal under OVS.

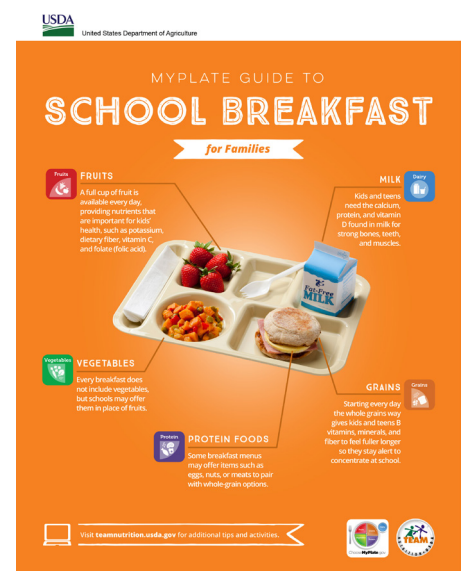
SHOW SLIDE: Clear Signage

SAY: Clear signage will reinforce the menu planner's intent of how much of a meal component/item a student may select to meet the requirements of a reimbursable meal. If choices of food items are offered within the components, the signage must indicate the menu planner's intent and identify what choices or combination of choices the student may select including any minimum or maximum number that may be taken to meet the requirements of a reimbursable meal.

Note: Visit <https://www.fns.usda.gov/tn/myplate-guide-school-breakfast> for the poster.

SHOW SLIDE: Signage Exceptions

SAY: Signage is not required for field trips, breakfast in the classroom, and other venues where signage may be problematic. However, other methods should be used to inform students of their choices.



SHOW SLIDE: *K–8 Breakfast Menu Example*

ACTIVITY: K–8 Breakfast Menu Example

Materials: K–8 Breakfast Menu Example worksheet

Time: 10 minutes

Instructions: Have participants review the **K–8 Breakfast Menu Example** worksheet and provide feedback to the corresponding questions. Discuss the participants' answers. The answers are located in the Appendix of the Participant's Workbook.

DO: Review the instructions for the **K–8 Breakfast Menu Example** worksheet activity.

K–8 Breakfast Menu Example

Instructions: Review the K–8 Breakfast Menu Example and provide feedback to the corresponding questions.

K–8 Breakfast Menu Example

Choose at least one (and up to two) of the same or different items:

- Slice of toast (1 oz eq grain) (1 grain item)
- Whole grain cereal (1 oz eq grain) (1 grain item)

Choose at least one (and up to all four) of the same or different items:

- Orange juice ($\frac{1}{2}$ cup fruit) (1 fruit item)
- Apple slices ($\frac{1}{2}$ cup fruit) (1 fruit item)
- Pineapple chunks ($\frac{1}{2}$ cup fruit) (1 fruit item)
- Mixed berries ($\frac{1}{2}$ cup fruit) (1 fruit item)

Choose one of the following items:

- Variety of milk (1 cup) (1 milk item)

Reimbursable breakfast meal:

- Students must select at least three food items.
- For grains and/or meats / meat alternates and milk, the student must select the minimum required daily serving.
- For the fruit component, the student must select at least $\frac{1}{2}$ cup of fruit or vegetables or fruit/vegetable combined.

K–8 Breakfast Menu Example, continued

If the student selects two milks, toast, and two fruit items, should the student be charged the unit price or the à la carte price for the selection of the extra milk?

Answer: The student's selection constitutes a reimbursable meal, but the menu planner limited the milk component to one choice. The student should be charged the à la carte price for the extra milk.

If the student selects two grain items, four fruit items, and one milk item, should the student be charged the à la carte price or the unit price for the menu selection?

Answer: The student's selection constitutes a reimbursable meal. The student should be charged the unit price for the selection of all items because the menu planner allowed multiple selections of grains and fruits.

If the student selects two slices of toast along with 1 cup of fluid milk, should the student be charged the unit price or the à la carte price for the meal?

Answer: The student's selection does not constitute a reimbursable meal. The menu planner has identified a student may select up to two of the same or different grain items. However, the student must select at least $\frac{1}{2}$ cup of fruit for a reimbursable meal. The student should be charged the à la carte price for the meal.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

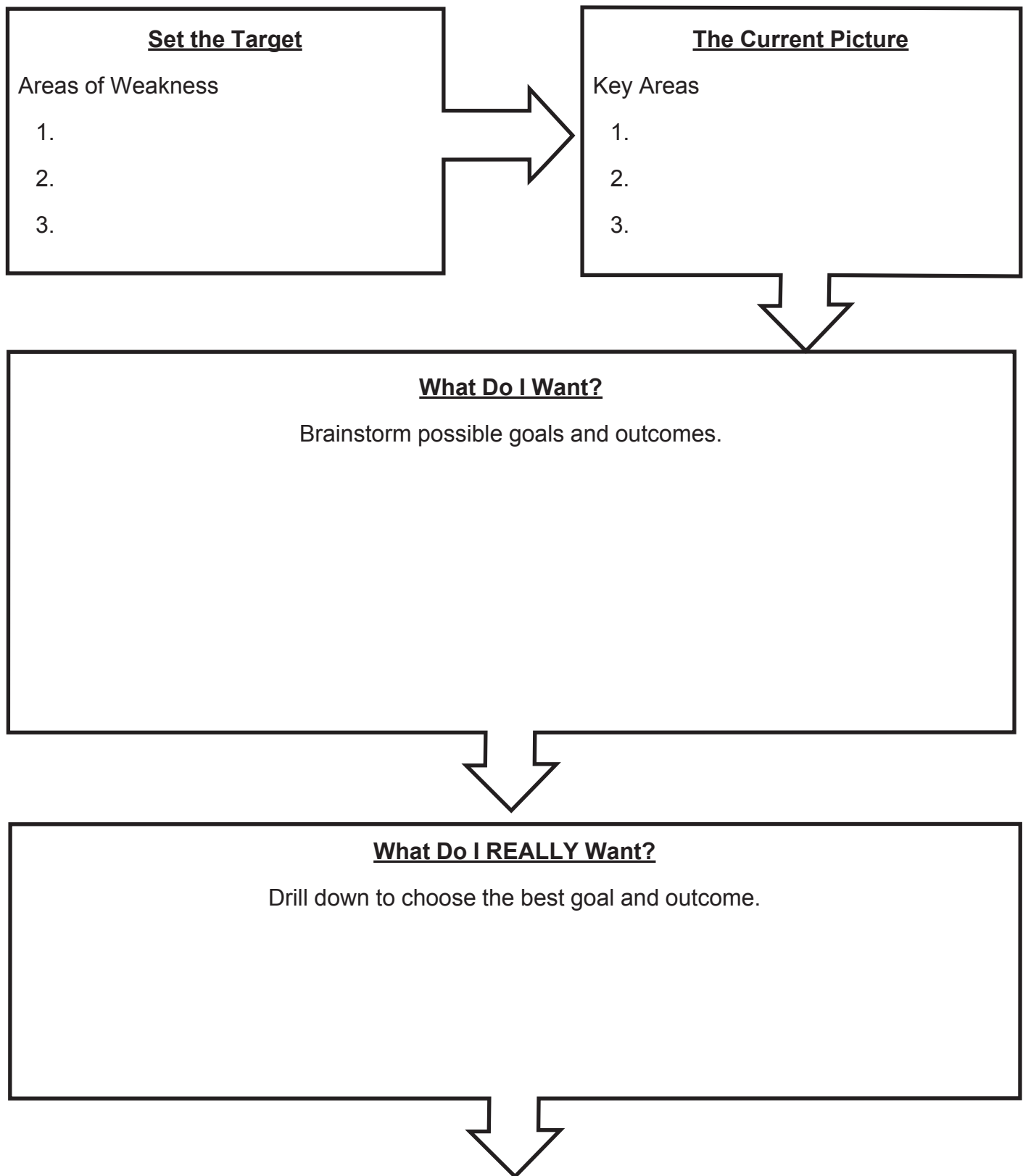
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Reimbursable School Meals. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Reimbursable School Meals** worksheet.

SMART Goals for Reimbursable School Meals



SMART Goals for Reimbursable School Meals, continued

Make sure it meets each characteristic.

<u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none">• Who?• What?• When?• Where?• How?	
<u>MEASURABLE</u> How will I measure it? <ul style="list-style-type: none">• How much?• How many?• How will I know it has been accomplished?	
<u>ACHIEVABLE</u> Is this something I can do? <ul style="list-style-type: none">• Am I prepared to make the commitment?• Am I willing to make major changes?• Is there a more achievable goal?	
<u>RELEVANT</u> Is this based on forecasted needs? <ul style="list-style-type: none">• Do I have the resources?• Does it make sense for my program?• Does it align with my priorities and needs?	
<u>TIME-BOUND</u> Does the time frame create a practical sense of urgency? <ul style="list-style-type: none">• What can I do TODAY to reach my goal?• What can I do one week from now?• What can I do one month from now?	
MY SMART GOAL IS:	

Customer Experience, Merchandising, and Food Presentation for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 2 ½ hours



Key Area: 4 (Communication)

USDA Professional Standards Code: 4130

2024

11/25/2024

Role of the School Nutrition Director

We can all agree that students are our primary customers in the school nutrition program. However, students are a very diverse group. Meeting the needs of a large group of students can present quite a challenge for the school nutrition program. It is a challenge that requires teamwork by the entire school nutrition staff. The school nutrition program director is the team leader and sets the tone for how the staff responds to the customer. It is important for the director to be strategic as they integrate all aspects of the food experience into staff training. As leader of the school nutrition team, if the director sets high standards, the rest of the team will reach up to them. Conversely, if a leader sets low standards, the staff will reach down to them.

The school nutrition staff may not realize how much their attitudes and actions can impact and help to develop positive customer relations. Coaching is an effective way to teach customer service and food presentation skills to the staff. The four-step model of coaching includes (1) telling, (2) showing, (3) practice and feedback, and (4) action. All of the steps are essential in achieving the desired behavior. As a coach and role model, the school nutrition director should provide immediate feedback and encouragement. Coaching should be followed up with the director/trainer modeling good customer service and food presentation skills and giving the staff an opportunity to practice what they have learned.

For school nutrition directors to achieve the goals of a school nutrition program, they must meet the expectations of today's student customer and should be more than just a place that provides students with access to reimbursable meals. The school nutrition director and the entire nutrition team should create a relationship between the customer and healthy eating, nutrition education, and an understanding of how appealing food contributes to the dietary choices of students. To ensure the continued relationship, it is important to ask customers what they think about food quality, food presentation, and customer service.

This evaluation component of customer service provides ideas and suggestions for improvement and helps identify problems and solutions for solving problems.

The primary mission of school nutrition programs is to serve the student customer and to make certain that school nutrition is an important part of the school team. This lesson provides important methods and management tools that will support the school organization in achieving a nutritionally sound program that meets customer expectations.

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Identify the customer.
- State how the principles of customer service, merchandising, and food presentation relate to attracting and keeping customers.
- Demonstrate how to use menus as part of a merchandising effort to attract customers and influence the preferences of children.
- Develop methods for evaluating customer service by self-assessment and from customer feedback.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify the customer.			
60 minutes	<ul style="list-style-type: none"> Lesson objectives Know Your Customer—Their Needs and Wants Bullying 	<ul style="list-style-type: none"> Review Objectives Identify Your Customer Customer Experience Scenarios “What Students Say” and “What Students Hear” Needs and Wants 	Participant's Workbook
Objective: State how the principles of customer service, merchandising, and food presentation relate to attracting and keeping customers.			
35 minutes	<ul style="list-style-type: none"> Key Elements of Food Presentation Establishing Quality Standards for Menu Items 	<ul style="list-style-type: none"> Principles of Customer Service, Merchandising, Food Presentation and Quality Meal Service 	Participant's Workbook
Objective: Demonstrate how to use menus as part of a merchandising effort to attract customers and influence the preferences of children.			
25 minutes	<ul style="list-style-type: none"> Merchandising the School Nutrition Program 	Service Line Checklist	Participant's Workbook
Objective: Develop methods for evaluating customer service by self-assessment and from customer feedback.			
30 minutes	<ul style="list-style-type: none"> Why Evaluate Customer Service? Self-Assessment Conclusion – SMART Goals 	<ul style="list-style-type: none"> Customer Feedback Sample Taste Test Form Quality Foodservice Survey (Self-Assessment) 	Participant's Workbook
Total: 2 ½ hours			

Customer Experience, Merchandising, and Food Presentation

SHOW SLIDE: Customer Experience, Merchandising, and Food Presentation

SAY: Welcome to Customer Experience, Merchandising, and Food Presentation. The purpose of this lesson is to develop an awareness of the importance of customer service and an understanding of how merchandising and the presentation of food in the school nutrition program are part of customer experience.

Objective: Identify the customer.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

SAY: How we offer food and treat our student customers are two of the most important elements of getting students to participate in the school nutrition program. Take a moment to reflect on the students who come into your cafeteria and the comments you hear as they go through the serving line. Visualize yourself as a student in your school.

As school nutrition professionals, you serve a very diverse group of students. They may come from different cultural backgrounds and income levels, and from other states or countries. With all the diversity in schools today, you can be sure the students in your district have different likes and dislikes. Remember, even students with similar backgrounds often have different food preferences. The thing they have in common is that they are your customers, and they are the reason for the existence of your school nutrition program. So, our first objective is to identify your customer.

Let's pause before we get into the lesson detail and think about your role as the director in the service of our student customers.

ASK: Will someone share your thoughts about the director's role in customer service, merchandising, and food presentation in school nutrition programs?

DO: Allow one or two participants to respond.

FEEDBACK:

As a leader, we are a role model and set the standard for customer service. It is our job to be nice to all of our customers.

ASK: Who can tell me what comes to mind when we use the term customer?

DO: Allow one or two participants to respond.

FEEDBACK:

The customers for school nutrition programs are students who have wants, needs, and expectations. It is important to ask them what they want and what expectations they have, and then work as a team to deliver those requests.

SHOW SLIDE: *Activity: Identify Your Customer*

ACTIVITY: Identify Your Customer

Materials: Identify Your Customer worksheet

Time: 10 minutes

Instructions: Have participants complete the **Identify Your Customer** worksheet. They may work as a group. Divide participants into groups by tables.

SAY: Locate the **Identify Your Customer** worksheet in the Participant's Workbook. Work as a group to answer the three questions in the space provided. Take about 3 minutes, and then I will ask some of you to share your ideas.

Identify Your Customer

Instructions: Answer these questions about the customers in your district. You can work as a group.

1. Who are the primary customers, and who are the secondary customers?
 - **The students are the primary customers of the school nutrition program; for the purpose of this lesson, we will focus on the student customer.**
 - **Our secondary customers include school administrators, teachers, support staff, and parents.**
2. What influences the needs and wants of school nutrition customers?
 - **Diversity: Because students who come to the cafeteria are so different, feeding them can be quite challenging.**
 - **Age: Certain characteristics are typically common to students at various stages or times in their lives; these characteristics influence their needs and wants.**
 - **Peers: Our adolescent customers have strong social needs and are often influenced by their peers.**
 - **Culture: Students come from many regional and ethnic backgrounds that influence eating patterns.**
3. What factors or groups influence our customers' eating habits?
 - **How customers feel at a particular time of day**
 - **The perception of how food served in the school meals program looks and tastes**
 - **The amount of time to eat and enjoy the company of their friends**
 - **The environment of the dining room; table arrangement**
 - **Whether or not there is positive reinforcement of behavior**
 - **The beliefs and practices of parents and teachers**

DO: Ask a person from one of the groups to answer the first question, and then ask another group to respond to the second question, etc. This should take about 1 minute per group. Ask if there are other ideas, and then point out any answers that were not been mentioned.

ASK: What about the students who do not eat in the cafeteria? Are they customers?

FEEDBACK:

Yes, they are customers that you are not reaching. You should have a goal and a plan of how you might reach these students.

ASK: What about the students who are free eligible that eat lunch but do not eat breakfast? Are they potential customers?

FEEDBACK:

Yes, they are also customers that you are not reaching at breakfast. Consider ways you might reach these students.

ASK: What are some of the reasons students do not eat school meals?

FEEDBACK:

- Students may be late to school
- Friends do not eat
- They would rather socialize.
- Lines may be too long

SAY: Every student is a potential customer, and the experience they have in the cafeteria contributes to whether they continue to eat in the cafeteria or not. We are going to do an activity about customer service that demonstrates rude Versus nice behavior toward our customers.

SHOW SLIDE: *Activity: Customer Experience Scenarios*

ACTIVITY: Customer Experience Scenarios

Materials: Customer Experience Scenarios handout

Time: 20 minutes

Instructions: Divide participants into teams. Assign each team a cafeteria scenario from the **Customer Experience Scenarios** handout to role-play. The scenario examples are fictitious and from different grade levels. Their assignment is to read their assigned scenario and discuss and answer the corresponding questions once they are finished reading.

SAY: Each team will be assigned a cafeteria scenario from the **Appropriate vs Inappropriate Scenarios** handout to role-play. The scenario examples are fictitious and from different grade levels. Your assignment is to read your assigned scenario and discuss and answer the corresponding questions once you are finished reading.

DO: Assign each group a scenario.

Customer Experience Scenarios

Instructions: Read the assigned scenario and discuss and answer the corresponding questions once you are finished reading.

First Grade Student

A terrified student in the serving line cannot remember what menu choice she signed up for in the morning classroom tally. The frontline staff member tells the student to “hurry up” and make a choice for lunch. The student quickly makes a choice and walks down to the cashier. The cashier tells the student, “It is okay. I know you will remember what you picked for lunch tomorrow. Have a great day.”

1. What happened in this scenario in regard to the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

Second Grade Student

A student dropped their tray as they were leaving the serving line on their way to the cashier. The student's hands and arms also include a coat, hat, and gloves for recess after lunch. The server asks someone to come and clean up the mess while she makes the student a new tray. She hands the student a new tray and tells them to “have a great day.” The frontline staff member cleaning up the mess tells the student to be more careful next time and not to carry too many items into the cafeteria.

1. What happened in this scenario in regard to the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

Fourth Grade Student

A student scored the winning touchdown on Friday; he is now considered a hero. He is quite proud of himself, and students are congratulating him, which is slowing down the line. The server congratulates the student on winning the touchdown and tells the other staff members on the line he got the winning touchdown. The student is proud that he is being recognized and proceeds to the cashier, where she tells him, “Come on, we need to keep the line moving.”

1. What happened in this scenario in regard to the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

Seventh Grade Student

A very popular female student is surrounded by a following of girls as they are watching her carefully to see what she chooses, which is extremely little. She has a very disrespectful attitude toward the nutrition staff. The frontline staff member serving the female student tells her that she is disrespectful and rude and that she should either improve her attitude or not return to the serving line for lunch. The female student leaves what she has chosen on the serving line and walks out of the cafeteria.

1. What happened in this scenario in regard to the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

High School Students Breakup

A student's boyfriend/girlfriend broke up with them, and they want to tell the cashier all about the breakup. The student is visibly upset, and the cashier is busy with a long lunch line. The cashier tells the student they are sorry to hear about their breakup and understand it must be difficult. The student shakes their head and looks down the serving line. The frontline staff member serving lunch makes a shooing motion toward the door so the student knows to keep the line moving.

1. What happened in this scenario regarding the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

High School Boy

A high school boy wants a second slice of pizza for free included with meal; he says he's on a school team and should get an extra portion. The server congratulates him for being on the team but lets him know that he is not the only person on the team and that if they were to give him pizza, they would have to give pizza to everyone. The frontline staff member tells him to bring money for a la carte sales next time.

1. What happened in this scenario in regard to the customer's experience?
2. What should be done differently next time?
3. How can you train your staff to respond?

DO: Ask each team to come up to front of the room in the order of age of the student in the scenario to demonstrate the positive and negative reaction.

SAY: Great job, everyone! So, there is a lot going on with our students that we don't know, right? Simply 'being nice' can make a big difference to our customers.

SHOW SLIDE: Activity: “What Students Say” and “What Students Hear”

ACTIVITY: “What Students Say” and “What Students Hear”

Materials:

- Note cards
- Pens or pencils

Time: 15 minutes

Instructions: Prepare two chart paper sheets with the headings “What Students Say” and “What Students Hear.” Participants will reflect on conversations they have overheard among students as they pass through the serving line. They will also reflect on comments they have heard school nutrition staff say to students. They will write their answers on note cards. Next, the groups will compare notes and decide on the top two statements staff hear from students and what top two statements students hear from staff. One person from the group will record two comments under each heading on the chart paper sheets.

SAY: Think about the things students say about different foods, the menu in general, things they like, and things they don't like. Use the note cards in the center of the table, and list at least two things you hear from students.

Next, think about what the students hear from the school nutrition staff as they go through the serving line. This time, think broadly and write down what you believe are the two most common phrases or statements made to children as they go through school cafeteria serving lines. Write your answers on the note cards. Work together at your table to compare notes. After you compare notes as a group, decide on the top two things students say as they go through the serving line, and two things you think children hear from the school nutrition staff when they are in the serving line. Select a representative from your group who will write your answers on the chart paper sheets.

DO: Give participants about 2 minutes to pick their top two statements in each category.

SAY: Now, let's get our answers up so we can see what we decided.

DO: Give recorders about 2 minutes to write their answers on the chart papers.

SAY: Circulate around the room with your group and put a mark by four statements that you think are the most common phrases.

DO: Read the phrases that have the most marks by them.

SAY: We have a very impressive list of phrases. Now we will talk about some statements customers hear when they enter a restaurant.

SHOW SLIDE: *Statements Customers Hear When They Enter a Restaurant*

SAY: Examples of the most common things customers hear when they enter a restaurant or when the waiter or waitress comes to their table are:

- “Hi, may I help you?”
- “Great to see you today; hope you enjoy your meal.”
- “Great choice of food selections today.”

ASK: What would the impact be if every school nutrition staff said positive phrases to the students when they enter the cafeteria or move through the serving line?

FEEDBACK:

Students would be happy. They would feel welcome. Students would have improved self-esteem. They would enjoy coming to the cafeteria.

SHOW SLIDE: *Bullying*

SAY: Bullying behavior is a growing concern among educators. It is not only physical aggression but can be different forms of unwanted behavior that can happen in the school cafeterias.

ASK: Have you witnessed bullying in your school programs? What should you do if you witness bullying in your operation?

FEEDBACK:

- Follow standard operating procedures.
- Report bullying to the designated authority.

SAY: School nutrition staff report that they witness bullying in cafeterias. Ask school administration to include school nutrition staff in anti-bullying trainings. It is important for nutrition staff to understand their role in promoting a safe, respectful, and welcoming space for all. There are many resources to help. I am passing out a handout from the National Education Association as an example. Please follow your school district's policy regarding reporting bullying situations.

Our students have enhanced palates and an idea of what they want as a cafeteria experience. By understanding what they want and what they need, schools can make more informed decisions about responding to customer preferences. Let's look at proactive ways to engage with and understand our customers.

SHOW SLIDE: *Activity: Needs and Wants*

ACTIVITY: Needs and Wants

Materials: Needs and Wants worksheet

Time: 7–8 minutes

Instructions: If time permits, have participants complete the section in the Participant's Workbook entitled **Needs and Wants** worksheet. They may continue to work as a group.

SAY: Work with your group to list two nutrition or food-related needs and two wants of the typical school-age child. Complete the **Needs and Wants** worksheet in the Participant's Workbook.

Needs and Wants

Instructions: List two needs and two wants as they relate to food and/or nutrition.

1. List two needs.
2. List two wants.
 - A. nutrition
 - B. identical recipes from home

DO: If time permits, ask someone from each table to report the group's ideas. You may want to list on chart paper. Allow discussion as the list is compiled. There are no right or wrong answers.

Objective: State how the principles of customer service, merchandising, and food presentation relate to attracting and keeping customers.

SAY: Next, we will discuss how the principles of customer service, merchandising, and food presentation relate to attracting and keeping customers. If we are going to meet the needs, as well as the growing demands of our customers, we need to understand how the basic principles of food presentation influence our customers' choice to eat or not eat in the school meals program. Think about this: regardless of the establishment you enter, whether it's a restaurant or retail store, the successful business grabs your attention as soon as you enter. The same rules must apply in the school nutrition program.

Think about their reaction to a meal that had macaroni and cheese, cauliflower, white milk, a white roll, and canned pears. Presenting food creatively can turn a dull looking foodservice line into a bountiful marketplace of healthful and appetizing eating opportunities. Students have the same impressions as most of us when deciding what they will select and eat as they come through the school meals serving line.

SHOW SLIDE: *Activity: Principles of Customer Service, Merchandising, Food Presentation, and Quality Meal Service*

ACTIVITY: Principles of Customer Service, Merchandising, Food Presentation, and Quality Meal Service

Materials: Principles of Customer Service, Merchandising, Food Presentation, and Quality Meal Service worksheet

Time: 15 minutes

Instructions: Have participants complete **Principles of Customer Service, Merchandising, Food Presentation, and Quality Meal Service** worksheet as the information is discussed.

SAY: Locate the **Principles of Customer Service, Merchandising, Food Presentation, and Quality Meal Service** worksheet in the Participant's Workbook. Answer the questions and statements as we discuss the information.

Instructor's Note: *The answers for the worksheet will be provided as information is covered in the training.*

Principles of Customer Service, Merchandising Food Presentation, and Quality Meal Service

Instructions: Answer the following questions and statements as they are discussed in the training.

1. What are the first impressions that might influence a student's decision to eat in the school nutrition program?
2. What are the key elements of food presentation?
3. What are descriptive terms that can be used to describe (or name) menu items when you publish district menus?
4. Food Quality Standards—the characteristics of food that are acceptable to consumers include factors such as appearance (size, shape, color, and consistency), texture, and flavor. Can you name others?

ASK: Can anyone tell me some of the first impressions that might influence a student's decision to eat in the school nutrition program?

DO: Pause and allow participant discussion.

FEEDBACK:

Your answers are excellent. I think we can all agree that:

- We eat with our eyes—then our mouths.
- If it looks good, we'll taste it. If it tastes good, we'll eat it.

Objective: Demonstrate how to use menus as part of a merchandising effort to attract customers and influence the preferences of children.

SHOW SLIDE: **5 Key Elements of Presentation**

SAY: Great food presentation includes several key principles.

- First, presentation must follow the basic rules of menu planning. Good menus have a variety of colors, textures, shapes, and heights. Don't forget that simplicity plays a role.
- Second, there must be an organized and well-decorated display or serving line. Fill the serving line with bright colors and have the food bountifully and attractively displayed.

In the next few slides, you will see ways that the school nutrition team can present food to increase eye appeal and stimulate appetite. As you view the slides, you may think:

- We don't have the materials, tools, or ingredients to do this.
- We can't afford this.
- We don't have staff with the talent; after all, we do not employ professional chefs.

SHOW SLIDE: **Colorful Serving Line 1**

SHOW SLIDE: **Colorful Serving Line 2**

SHOW SLIDE: **Colorful Serving Line 3**

SAY: You are right about the challenges, but think about this: Can your program partner with a local chef? Can you establish standards so your staff could do some of these things? Can you modify ideas to use in the cafeteria? For example, you can decorate the serving line or arrange the food in a more colorful and pleasing manner.

SHOW SLIDE: **Color**

SAY: Using color to increase eye appeal is one of the basic principles of menu planning.

ASK: How often do you observe the finished plate or tray in the cafeteria line? Are you always pleased with the color?

DO: Allow a few comments.

FEEDBACK:

Sometimes color in food is changed based on how it's prepared.

SHOW SLIDE: *Color: Preparation Techniques*

SAY: You can see from this slide how overcooking can change the color and appearance of food.

ASK: Have you ever had this happen in one of the schools in your district? Does it affect the reputation of your program? Will students remember the poor quality the next time they are deciding to choose a meal? Should you remove poor quality meals from the service line? What can directors do to help the food preparation staff understand why overcooked food diminishes the appetite?

DO: Allow comments.

FEEDBACK:

Answers are subjective and there are no right or wrong responses.

SHOW SLIDE: *Texture*

SAY: Did you know that texture is one of the most important attributes used by consumers to assess food quality? Think about how eating a taco gives your mouth a sensation of different textures. By combining crisp foods with soft foods, or vice versa, we get a great presentation and it is a party in our mouths! Of course, you don't have to combine the two textures in the same dish, but both should exist on the menu. When we go into a restaurant and order a green salad to go with our entrée, it's often because we want a mixture of textures, though that particular thought may be more subconscious than conscious.

ASK: What are the texture combinations in the meal on this slide that make it more interesting?

FEEDBACK:

Combining crunchy carrots and crisp lettuce with the grilled chicken strips is much more appealing than a plain serving of chicken strips.

SAY: When you are developing a menu, think about terms you can use to describe the texture in menu items to help students perceive them as appealing.

SHOW SLIDE: Texture Names

ASK: How many of you use descriptive terms to describe the menu items when you publish the district menus?

DO: Ask participants who answer, “Yes,” if they would like to share some of their favorite descriptive terms with the group. Ask participants to make notes in the Participant’s Workbook if they hear descriptive terms they want to use.

SAY: Feel free to make notes in your Participant’s Workbook if you hear descriptive terms you want to use. The next presentation principle involves shapes in food. Have you ever thought about how combining shapes makes food more appealing? We can add eye appeal by combining natural shapes or creating new shapes.

SHOW SLIDE: Shapes: Food Variety 1

ASK: What shapes look appealing in this tray?

DO: Pause and allow 1 or 2 minutes for discussion.

SHOW SLIDE: Shapes: Food Variety 2

SAY: A variety of shapes gives the impression of a variety of foods. Children will look at a sandwich cut in a different way as a different food.

SHOW SLIDE: Shapes: Food Variety 3**SHOW SLIDE: Shapes: Food Variety 4****SHOW SLIDE: Simplicity**

SAY: Simple, clean lines and shapes are most pleasing to the eye. Too much food on a plate or a tray that is too small causes the food to look messy and unappetizing. Notice the clean-cut lines of the food and how the soup is merchandised to make it whet the appetite.

SHOW SLIDE: Height

SAY: A variety of heights is important for food presentation. Look at this slide and ask yourself, “How can I apply this concept in my schools?” Do you have a deli bar or serve wraps?

ASK: Do any of you have techniques that you would like to share about how you add height on the serving line to make the food presentation more appealing?

DO: Allow participants to volunteer suggestions.

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: Self-Serve Packaging

SAY: Pre-prepared or prepackaged salads are a great merchandising option for schools. Presentation makes a big difference in selling prepackaged meals. Part of the challenge is to showcase the food products in an appealing way. This slide shows a relatively simple way to make a salad and display it in an appealing manner. For example, this may be helpful for Grab & Go menu options in a busy cafeteria.

ASK: Can you think of ways a director can motivate the staff to implement the basic rules of food presentation? Take a minute to discuss ideas with your team.

DO: Allow a couple of minutes for participants to discuss and then ask volunteers to respond.

Instructor's Note: *This can be done as a large group activity to save time—don't spend more than 2 minutes on this discussion.*

FEEDBACK:

- Well planned menus take into consideration the principles of food presentation.
- Think of food presentation as an art.
- Remember that no matter how skillful you become at planning menus, the final presentation is a critical last step.

SAY: You cannot talk about customer service and food presentation without discussing quality meals and meal service. The ICN online course *Focus on the Customer*, reminds us that quality meal service relates to the entire school nutrition program, starting with the time the food is received at delivery and continuing to the time the customer leaves the dining room. Each school nutrition program should set quality standards that can be used to evaluate each menu item to ensure that an acceptable standard is in place. The quality standards should become part of the standardized recipe and all production staff should be familiar with each standard. Foods that do not meet the quality standard should never be served to customers. Quality standards and product evaluation are important aspects of food and nutrition customer service.

ASK: What do we mean by quality standards?

DO: Allow one or two participants to respond.

FEEDBACK:

Food quality standards are the characteristics of food that are acceptable to consumers. This includes factors such as:

- Appearance (size, shape, color, and consistency)
- Texture or consistency
- Flavor and seasoning

SAY: Remember, as the director, you should work with your employees to set standards for quality and then look for ways to meet these standards every day. Training will be important. Make sure your employees understand the standards and know how to meet them.

ASK: Now that you have planned great menus and provided for beautiful food presentation, how do you convey that message to the students?

FEEDBACK:

Merchandising is the way you encourage students to participate in the school nutrition program. How you present food and menus is extremely important, so is how your employees present themselves. Having a clean and bright serving line and staff in attractive uniforms is a signal that your school offers a quality program.

SHOW SLIDE: *Activity: Service Line Checklist*

ACTIVITY: Service Line Checklist

Materials:

- Note cards
- Pens or pencils

Time: 10 minutes

Instructions: Ask participants to create a short checklist for their service line. This short form with 5 to 10 questions would serve as a routine audit prior to meal service. Each table work as a team to report for class discussion.

SAY: Let's briefly design a short audit tool for our everyday service line. As a team list 5 to 10 questions for a checklist prior to meal service. We will share your team's ideas. You may write on an index card.

DO: Ask a participant from each team to provide their audit checklist ideas.

SAY: As a director, you must constantly deliver a message to everyone that your meals look good, taste good, and are the best bargain in town. Part of this message is through your marketing plan. However, part of merchandising is connected to food presentation. One excellent way to merchandise the food being served in the school nutrition program on any given day is through well-written menus that are published in an attractive manner.

SHOW SLIDE: *Elementary School Menu*

ASK: How can the menu contribute to a merchandising program?

DO: Allow participants to answer.

FEEDBACK:

- Well-written menus with descriptive terms may influence students to want to eat in the cafeteria.
- Menus that include nutrition information help both parents and students understand that school meals are good for you.

ASK: Think about this—when you go into a restaurant, are you influenced by the description of the menu item that you decide to order?

DO: Allow discussion.

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: **Serving Lines: Look Appealing**

ASK: Which of these displays would be most appealing to you if you were the customer? Would you be critical of the jumbled-up display?

DO: Allow participants to answer.

SAY: Most of us would likely react in a positive way to the more organized display of milk, and we would most likely criticize the less organized display if we were the customers. Put yourself in the shoes of the students, and develop a plan to ensure your serving lines are always clean, attractive, and organized. The impact of placement on the serving line should never be regarded as unimportant. Looks sell!

Objective: Develop methods for evaluating customer service by self-assessment and from customer feedback.

SHOW SLIDE: **Why Do We Evaluate Customer Service?**

ASK: Why do we evaluate customer service?

FEEDBACK:

We evaluate our customer service to get the following information:

- To know what our customers think of our service
- To gain ideas and suggestions for improvement
- To identify problems and solutions for solving problems

SHOW SLIDE: **How Do We Evaluate Customer Service?**

ASK: How do we evaluate customer service? How do we get this information from our customers?

SHOW SLIDE: **Activity: Customer Feedback**

ACTIVITY: Customer Feedback

Materials:

- Chart paper
- Markers

Time: 7–8 minutes

Instructions: Participants will work as a team to identify five characteristics or tools that would help them get to know customers' likes and dislikes. The characteristics or tools can be any component of the school nutrition program from food quality to dining environment. Participants will list those things about the dining experience that will lead students to eat or not eat school meals. They will write the characteristics or tools on a chart paper sheet and post on the wall.

SAY: Someone from each group will get a chart paper sheet to use in the next activity. As a group, record five characteristics or tools that will help you get to know your customers' likes and dislikes. The characteristics or tools can be on any component of the school nutrition program from food quality to dining environment. Take about 5 minutes to prepare the list. When you finish, post the sheet on the wall for everyone to view. One person from each group will report.

DO: Allow 5 minutes for the teams to discuss and list the five characteristics or tools. Then have someone from each team report. Allow all teams to report. Examples include taste panels, focus groups, surveys, and suggestion boxes.

SAY: Remember local policy will affect any evaluation conducted on school premises. You may need to get permission to do a written survey. Both formal and informal evaluations are useful. Examples of formal evaluations are surveys, focus groups, interviews, and guided discussions. Informal evaluations include taste tests, customer feedback cards, quality scorecards, and temperature checks.

SHOW SLIDE: *Activity: Sample Taste Test Form*

ACTIVITY: Sample Taste Test Form

Materials: Sample Taste Test Form



Time: 2 minutes

Instructions: Have participants review the **Sample Taste Test Form** in the Participant's Workbook.

SAY: Locate the **Sample Taste Test Form** in the Participant's Workbook. This is one example of a form you can use to conduct taste tests with young children. With this form, children can simply mark the sad face or the happy face to signify their dislike or like of the food they are sampling. This form will work well with kindergarten or first grade children. You may have surveys and other taste-test forms that you have used at your school.

Sample Taste Test Form

Instructions: Circle or X the number that best answers each question, 1 is the worst and 3 is the best.

		
How does the food look?	1	3
How does the food taste?	1	3
How is the texture?	1	3
How does the food feel in your mouth?	1	3
How does the food smell?	1	3
Was it the right temperature?	1	3
How do you like the food?	1	3

DO: Allow participants to respond.

SAY: We can take the information we gather from our customers and make necessary changes.

ASK: Can you think of changes you have made based on customer feedback? If so, will you share your ideas?

DO: Allow one or two participants to respond.

SAY: Perhaps you learned that the milk is not cold enough, and the food is not hot enough. Perhaps you learned that the cafeteria servers do not smile and greet your student customers. Many times the adjustments we need to make to improve customer service do not require money—only a listening ear, observant eye, and the desire to serve the best quality of food. More examples include recipe modifications and/or menu selection choices.

SHOW SLIDE: **Activity: Quality Foodservice Survey (Self-Assessment)**

ACTIVITY: Quality Foodservice Survey (Self-Assessment)

Materials: Quality Foodservice Survey (Self-Assessment) handout

Time: 8 minutes

Instructions: Have participants locate the **Quality Foodservice Survey (Self-Assessment)** handout in the Participant's Workbook. Discuss the form. Then have them complete the form for their district.

SAY: Finally, we must remember that self-assessment is as important as the evaluations that other people do. Look in the Participant's Workbook for the **Quality Foodservice Survey** handout. Take a minute or two to look at the self-assessment related to meal quality in your district.

ASK: What are your thoughts on the benefits of using this type of evaluation tool and how it might be used? Does anyone use something similar in your district? Do your managers complete it? How often?

SAY: You could use this as a survey in addition to a self-assessment and use it on all levels of potential customers. Now let's actually complete the self-assessment and see how you feel you are measuring up in your school. Think about how your school district is currently engaged in improving quality meal service to provide excellence in customer service. Check each item as *Mission Accomplished*, *Mission in Progress*, or *Mission Needs Attention*. If you don't know which term is applicable, then write the word "unsure."

Quality Foodservice Survey (Self-Assessment)

Instructions: Rate the meal quality in your district, *Mission Accomplished*, *Mission in Progress*, or *Mission Needs Attention*.

Quality Foodservice Survey (Self-Assessment)	Mission Accomplished	Mission in Progress	Mission Needs Attention
Quality Meal Service			
Tasty food is served at the peak of freshness and at the appropriate temperature.			
Foods served have a variety of color, texture, height, and flavor.			
Food is displayed attractively on an organized serving line/counter.			
Servings are placed neatly on the plate or tray without spills.			
Food is served according to menu description.			
A variety of food choices is available.			
Prepared items follow standardized recipes.			
Fresh fruits and vegetables are offered daily.			
There are correct and consistent food portions for all customers.			
Safe Food			
Temperature of foods on the service line is checked often.			
Food safety programs are implemented.			
Spills are cleaned promptly.			
Serving and eating utensils are clean.			
A clean place to sit is available after being served.			
Personnel are neat and clean.			

Dining Environment			
Service line moves smoothly with few backups.			
Dining area is attractive and appropriately decorated.			
Arrangement of table and chairs is attractive and supports social interaction.			
Staff is efficient and friendly, and environment is customer-service oriented.			
Staff embraces the value of quality meal service as part of customer service.			
Merchandising Efforts			
Menus are distributed to students on a regular basis.			
Students are involved in the menu planning process.			
Menu terms are descriptive and appeal to students.			
Menus are publicized with nutrient content.			

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

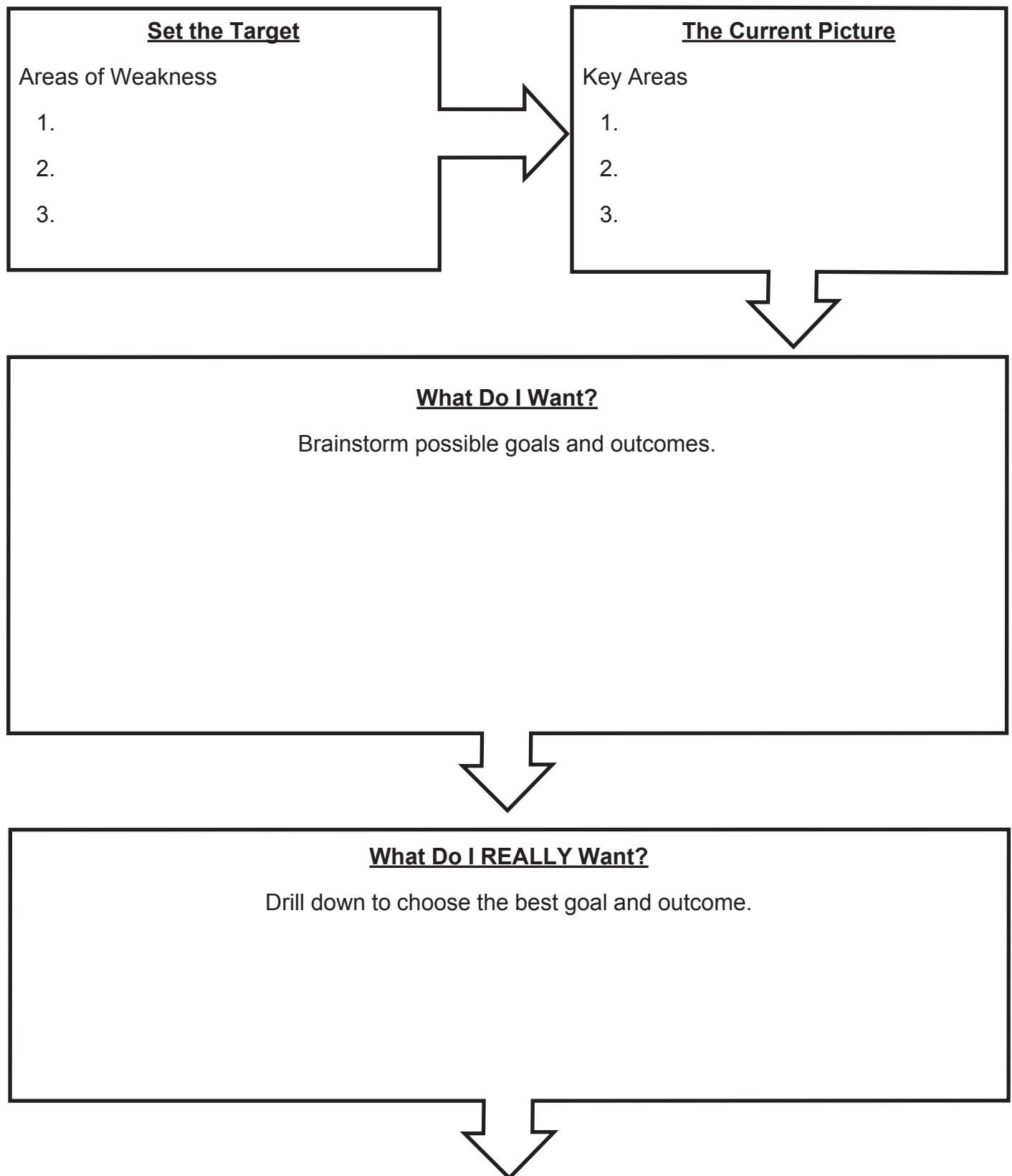
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Customer Service, Merchandising, and Food Presentation. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Customer Experience, Merchandising, and Food Production** worksheet.

SMART Goals for Customer Experience, Merchandising, and Food Presentation



SMART Goals for Customer Experience, Merchandising, and Food Presentation, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u></p> <p>How will I do it?</p> <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? 	
<p><u>MEASURABLE</u></p> <p>How will I measure it?</p> <ul style="list-style-type: none"> • How much? • How many? • How will I know it has been accomplished? 	
<p><u>ACHIEVABLE</u></p> <p>Is this something I can do?</p> <ul style="list-style-type: none"> • Am I prepared to make the commitment? • Am I willing to make major changes? • Is there a more achievable goal? 	
<p><u>RELEVANT</u></p> <p>Is this based on forecasted needs?</p> <ul style="list-style-type: none"> • Do I have the resources? • Does it make sense for my program? • Does it align with my priorities and needs? 	
<p><u>TIME-BOUND</u></p> <p>Does the time frame create a practical sense of urgency?</p> <ul style="list-style-type: none"> • What can I do TODAY to reach my goal? • What can I do one week from now? • What can I do one month from now? 	
<p>MY SMART GOAL IS:</p>	

Food Production and Operation Management for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 2 ¼ hours



Key Area: 2 (Operations)

USDA Professional Standards Code: 2000

2024

11/25/2024

Role of the School Nutrition Director

A successful director must be able to do the following:

- Understand the various elements of the menu
- Guide the development and daily use of production standards
- Ensure implementation of quality standards for foods that meet the nutrition goals of the program and the taste preferences of the student customers
- Understand the various culinary techniques, recipe development, and modification processes necessary for the production of healthful, student-acceptable school meals

Directors are challenged with leading their team to prepare more foods onsite and to move away from serving prepared items. As this happens, the school nutrition director must offer training in food preparation, provide additional cooking and holding equipment, and make other operational changes. Food quality is ultimately in the hands of the site-based manager and staff.

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Describe how the principles of food production impact food quality.
- List the principles of developing and using standardized recipes.
- Describe the importance of accurate weights and measurements in food production.
- List the principles of using cycle menus.
- Identify the importance of documenting and evaluating the amount of food planned, prepared, and served on food production records.
- State the importance of production scheduling to achieve operational goals.
- List food quality standards that ensure quality food production.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
15 minutes	<ul style="list-style-type: none"> Lesson Objectives Food Production and Operation Management Food Production System 	Review Objectives	Participant's Workbook
Objective: Describe how the principles of food production impact food quality.			
35 minutes	<ul style="list-style-type: none"> Principles of Food Production Developing and Using Standardized Recipes 	Principles of Food Production	Participant's Workbook
Objective: List the principles of developing and using standardized recipes.			
35 minutes	<ul style="list-style-type: none"> Benefits of a Standardized Recipe Recipe Adjustment 	Standardized USDA Recipes	Participant's Workbook
Objective: Describe the importance of accurate weights and measurements in food production.			
10 minutes	Weights and Measures	Basics at a Glance	<ul style="list-style-type: none"> Participant's Workbook Basics at a Glance poster
Objective: List the principles of using cycle menus.			
20 minutes	Using Cycle Menus		Participant's Workbook
Objective: Identify the importance of documenting and evaluating the amount of food planned, prepared, and served on food production records.			
10 minutes	<ul style="list-style-type: none"> Food Production Records General Information 	<ul style="list-style-type: none"> Required Information for School Meals Production Food Production Record 	Participant's Workbook
Objective: State the importance of production scheduling to achieve operational goals.			
5 minutes	<ul style="list-style-type: none"> Types of Production Schedules Cleaning Schedules Conclusion – SMART Goals 	<ul style="list-style-type: none"> Daily Work Schedule for Food Production and Service Service Line Food Placement Diagram 	Participant's Workbook
Objective: List food quality standards that ensure quality food production.			
5 minutes	<ul style="list-style-type: none"> Food Quality Standards Conclusion – SMART Goals 		Participant's Workbook
Total: 2 ¼ hours			

Food Production and Operation Management

SHOW SLIDE: *Food Production and Operation Management*

SAY: The production and service of nutritious, high quality, economical meals that are acceptable and enjoyable to student customers are as much the core functions of school nutrition operations today as they were in 1946 when President Harry S. Truman signed the National School Lunch Act. However, there have been many changes that impact the way we produce food for students in today's SNPs.

SHOW SLIDES: *Lesson Objectives and Lesson Objectives, continued*

DO: Review the objectives for this lesson.

SHOW SLIDE: *Change*

SAY: Food preferences of students have changed from eating more traditional meals to fast foods. Today, there is a movement throughout the nation to improve the meal quality for children, and schools are expected to play a major role. It is important for the director to work with the school nutrition team to improve the nutritional quality of the food produced in the school district.

DO: Write the word "change" on chart paper.

ASK: Can you think of specific changes over the years that affect the way schools prepare and serve meals? List at least five changes in the Participant's Workbook.

FEEDBACK:

Include the following points if not mentioned by participants:

- Multiple choices of places to eat
- A greater variety of food to eat
- Standards for reimbursable meals have been implemented that require schools to offer meals that meet the nutrition principles of the *Dietary Guidelines for Americans* (DGA)
- Sophisticated palates
- Ethnic diversity

DO: Allow time for participants to make their lists.

ASK: Will some of you share your ideas?

Instructor's Note: *Allow participants to volunteer answers. As participants suggest changes, have someone record the changes.*

SAY: As a school nutrition director, your role is continually evolving. Every day is different from the day before. In this next activity, we will look at the role of the school nutrition director as it relates to food production and operations management.

SHOW SLIDE: Activity: Role of the School Nutrition Director**ACTIVITY: Role of the School Nutrition Director**

Materials: Role of the School Nutrition Director worksheet

Time: 10 minutes

Instructions: Ask participants to turn to the **Role of the School Nutrition Director** worksheet in the Participant's Workbook. Allow them to read the responsibilities and give themselves a rating on a scale from one to five.

ASK: How do you see your leadership role as the school nutrition director in the area of food production and operation management?

DO: Pause and allow one or two comments.

FEEDBACK:

- Pre-costs menus
- Provides regular supervision, coaching, and monitoring of the food production process

SAY: In the Participant's Workbook, turn to the **Role of School Nutrition Director** worksheet and take a few moments to read these responsibilities. As you read, give yourself a rating on each responsibility. Give yourself a five if you feel you know just about everything related to that area or you can perform the responsibility easily. Give yourself a one or a two if you feel you are a beginner or have a lot to learn. And of course, you can rate yourself anywhere in between.

DO: Allow about 10 minutes for this activity.

Role of the School Nutrition Director

Instructions: On a scale of one to five, with five being proficient and one needing improvement, assess your role as a director.

Role of School Nutrition Director—Food Production	Rating 1–5
1. Sets quality standards for food prepared and served, and provides guidance to ensure meals are prepared according to those standards	
2. Understands culinary techniques, recipe development, and modification processes necessary for the production of healthful, student-acceptable school meals	
3. Plans menus in compliance with USDA criteria and generally accepted principles of menu planning	
4. Prepares specifications and purchases food consistent with menu plan	
5. Ensures that standardized recipes are available and used	
6. Develops safety plan and trains staff in the implementation of the plan and in preparing food	
7. Pre-costs menus	
8. Allots labor hours to schools by determining number of personnel needed to prepare and serve meals at each site	
9. Trains managers to use appropriate forecasting techniques for determining quantity of food to be prepared	
10. Trains managers to prepare and monitor use of production records	
11. Provides resources including equipment and supplies necessary for preparing quality food	
12. Provides an ongoing training program for all school-based personnel in the techniques necessary to ensure production of school meals that meet the <i>Dietary Guidelines for Americans</i> (DGAs)	
13. Provides regular supervision, coaching, and monitoring of the food production process	
14. Attends professional staff development seminars and conferences to learn current regulations that impact food production techniques	

ASK: Did any of you get a five on all of the responsibilities?

DO: Pause for discussion.

SAY: You may want to refer to this worksheet as we discuss the lesson today, and make notes of things that would help you in each area of responsibility. School nutrition directors must be competent and knowledgeable in many areas to succeed in the complex and ever-changing environment in which school nutrition operates.

SHOW SLIDE: Food Production System

Objective: Describe how the principles of food production impact food quality.

SAY: Our first topic in this lesson is to help you understand how food production impacts food quality. The food production system is the core function of school nutrition service operations. It largely determines how food is prepared and should be designed to enhance the nutritive value, quality, and customer acceptance of food. It is through this system that schools meet the nutrition program's purpose of safeguarding the health of the nation's children by serving healthy, appealing, safe, and acceptable school meals to students. It provides the basis necessary for schools to produce the desired number of quality meals in a cost-effective manner.

ASK: What are the characteristics of a well-planned food production system?

FEEDBACK:

A food production system designed to meet the goals of the SNP should:

- Be efficiently designed and appropriately equipped
- Have adequate dry storage, refrigerated storage, and freezer space appropriately located
- Be capable of maintaining all products at the correct temperature
- Be staffed by a school nutrition team that is appropriately trained and empowered to maximize the use of their skills and the resources available to provide tasty and nutritious foods

SAY: While the quality of food is ultimately in the hands of the site manager and staff, an effective director will understand and implement the fundamental principles of food production. The director must provide the knowledge and leadership necessary to the management of an operations system to ensure high standards for quality food production.

SHOW SLIDE: Activity: Principles of Food Production**ACTIVITY: Principles of Food Production**

Materials: Principles of Food Production worksheet

Time: 10 minutes

Instructions: Have participants break into groups to answer the questions on the **Principles of Food Production** worksheet in the Participant's Workbook.

SAY: Pause and think about some of the important fundamental principles of food production. On the **Principles of Food Production** worksheet in the Participant's Workbook there are 11 questions related to some of the principles that help ensure the quality production of nutritious food for schoolchildren. Work as a team to answer each question. Choose the correct answers from the list of key words in the box.

Principles of Food Production Answer Key

Instructions: Work as a team to match each key word with one of the questions that follow. The first letter of each key word has been bolded.

Key Words	
<i>Dietary Guidelines for Americans</i> Freshness Forecasting Herbs and Spices Batch Cooking Menu	Production schedules Scratch cooking Standard operating procedure Standardized recipe Weighed

1. What drives the food preparation process? Menu
2. What technique is used to determine the number of food items and meals to prepare? Forecasting
3. What tells School Nutrition Frontline Staff the amount of each food item to prepare, portion sizes, time schedule, and person responsible? Production schedules
4. Ingredients must be selected at the peak of freshness for quality products.
5. All ingredients are weighed or measured accurately.
6. All culinary techniques selected should support preparation consistent with the standardized recipe.
7. What is a term that means preparing a menu item in small enough amounts that it will be at its peak of quality when placed on the serving line? Batch cooking
8. What can be used to help develop and enhance flavors of food items? Herbs and Spices
9. What type of cooking allows the user to have control of ingredients contained in the food item? Scratch cooking
10. What are vital resources for school nutrition staff to prepare healthy and appealing food, maintain equipment, and work in a safe and sanitary manner? Standard Operating Procedures
11. The meal pattern for NSLP and SBP follows the Dietary Guidelines for Americans.

SHOW SLIDE: Developing and Using Standardized Recipes

Objective: List the principles of developing and using standardized recipes.

SAY: In order to produce high quality food in the SNP, it is necessary for the entire school nutrition staff to know the principles of developing and using standardized recipes. These are the basis for preparing foods of a consistent quality and quantity in any operation.

SHOW SLIDE: Benefits of a Standardized Recipe

SAY: A standardized recipe is one that has been tried, adapted, and re-tried several times for use by a given foodservice operation. Standardized recipes produce the same food results and yield every time when using the:

- Exact procedure
- Same type of equipment
- Same quantity and quality of ingredients

ASK: What are benefits of using a standardized recipe?

FEEDBACK:

Possible responses:

- Control cost
- Portion control
- Quality control

DO: Refer participants to the **Benefits of Using Standardized Recipes** handout.

Benefits of Using a Standardized Recipe

Using standardized recipes help ensure:

- The product will be of the same quality each time it is prepared.
- The yield is the same each time the recipe is prepared.
- Both time and money are saved because employees are familiar with recipes.
- Employees will do a better job.
- The cafeteria prepares enough food.
- Food orders are more accurate.
- The food item always tastes the same no matter which employee prepares the recipe.
- The manager can better control costs.

SHOW SLIDE: *Activity: Standardized USDA Recipes*

ACTIVITY: Standardized USDA Recipes

Materials:

- **Parts of a Standardized Recipe** worksheet
- **Bok Choy Wrappers** recipe worksheet

Time: 10 minutes

Instructions: The parts of a standardized recipe are underlined and bolded on the **Bok Choy Wrappers** recipe in the Instructor's Manual. Ask participants to use the **Parts of a Standardized Recipe** worksheet to match the 15 standardized recipe parts on the **USDA's Bok Choy Wrappers** recipe to the components on the list. Allow participants to work together to identify the parts.

SAY: A standardized recipe has 15 important parts. Use the **Parts of a Standardized Recipe** worksheet and the **USDA's Bok Choy Wrappers** recipe handout to match each of the 15 standardized recipe parts. When you find a part on the recipe that matches one of the 15 parts listed, write that number on the recipe and place a checkmark beside it on your list. For example, find the recipe name on the USDA recipe and write number 1 beside it. Take about 2 minutes to complete the exercise, and then we will continue discussing standardized recipes. You may work together to identify the parts.

Parts of a Standardized Recipe

Instructions: Match the standardized recipe parts on the **USDA's Bok Choy Wrappers** recipe handout to the components on the list. Work together to identify the parts of a standardized recipe.

- ___ 1. Recipe Name
- ___ 2. Meal Components
- ___ 3. Recipe Category
- ___ 4. Recipe ID Number
- ___ 5. Ingredients
- ___ 6. Servings per Recipe
- ___ 7. Weight and Measure
- ___ 8. Preparation Instructions
- ___ 9. Ingredient Amounts
- ___ 10. Equipment needed
- ___ 11. Cooking Time and Temperature
- ___ 12. CCP (Critical Control Point)
- ___ 13. Portioning Utensil
- ___ 14. Serving Information
- ___ 15. Serving Size and Component Contributions

Adapted from *USDA's Anatomy of a Standardized Recipe* (2018, September)

Meal Components: Meat–Dark Green
Vegetable–Fruit–Grains **2**

Bok Choy Wrappers **1**

Sandwiches **3**
F-11r **4**

Ingredients 5	50 Servings 6		100 Servings 6		Directions 8
	Weight 7	Measure 7	Weight 7	Measure 7	
Water	1 gal 2 qt		3 gal		1. Boil water.
Brown rice, long grain, regular, dry	5 lb 9	3 qt 9 ½ cup	10 lb 9	1 gal 9 2 ¼ qt	2. Place 2 lb 8 oz brown rice in each steam table pan (12"x20"x2 ½"). 10 For 50 servings, use 2 pans. For 100 servings, use 4 pans. 3. Pour water (3 qt per steam table pan) over brown rice. Stir. Cover pans tightly. 4. Bake: Conventional oven: 350 °F for 40 minutes Convection oven: 325 °F for 40 minutes 11 5. Remove from oven and let stand covered for 5 minutes.
*Fresh bok choy, sliced ¼"	3 lb 6 oz	1 gal	6 lb 12 oz	2 gal	6. Combine brown rice, bok choy, pineapple, chicken, sweet and sour sauce, and soy sauce. Pour into steam table pans (12"x20"x2 ½"). For 50 servings, use 2 pans. For 100 servings, use 4 pans.
Canned pineapple tidbits, in 100% juice	6 lb 10 oz	3 qt (1 No. 10 can)	13 lb 4 oz	1 gal 2 qt (2 No. 10 cans)	
Frozen, cooked chicken strips, thawed	6 lb 2 oz	1 gal 2 qt		3 qt	
Sweet and Sour Sauce		1 qt 2 cups	6 lb 12 oz	2 gal	
Low-sodium soy sauce		2 Tbsp		¼ cup	

					7. Bake: Conventional oven: 350 °F for 30 minutes Convection oven: 325 °F for 20 minutes Critical Control Point: Heat to 165 °F or higher for at least 15 seconds.
					8. Critical Control Point: Hold for hot service at 135 °F or higher. 12
*Fresh romaine lettuce, outer leaves, rinsed, dry	5 lb	100 leaves	10 lb	200 leaves	9. Top each romaine leaf with a 6 fl oz spoodle (3/4 cup) filling. Optional: Garnish with diced red peppers. Fold sides of lettuce in toward center; roll up like burrito. Place seam side down. Serve immediately. 13
Two wraps provide 1 oz equivalent meat, 3/4 cup dark green vegetable, 1/4 cup fruit, and 1 1/2 oz equivalent grains. 15 One wrap provides 1/2 oz equivalent meat, 3/8 cup dark green vegetable, and 3/4 oz equivalent grains. 15					10. Serve 2 wraps. 14

*See Marketing Guide for purchasing information on foods that will change during preparation or when a variation of the ingredient is available.

Adapted from *What's Cooking? USDA Mixing Bowl*

ASK: Why is it possible for a recipe to be standardized in one school and not another?

SAY: Many times we think a recipe has been standardized and is ready for use in our programs, but that is not necessarily so. Conditions and equipment differ from one SNP to another.

It is important to remember that while recipes are standardized at the district level, it is the responsibility of the school nutrition director to oversee the standardization of the recipes for the individual schools. The quality of the product is always checked by tasting it during the standardization process. Before finally accepting the recipe, you should also conduct a taste test with your customers. Remember: adding a little more or a little less of any ingredient could make the difference between the success and failure of a recipe and impact the nutrient content of the product.

SHOW SLIDE: *Procedures Instead of a Recipe*

SAY: Sometimes we use what is referred to as a procedure instead of a recipe when preparing food to serve students who are our school nutrition customers.

ASK: What is the difference between a procedure and a recipe?

FEEDBACK:

A procedure identifies the steps and techniques needed for combining and preparing or finishing a product. You find procedures on packages of commercially prepared mixes, entrees, and other products. Just as it is essential to follow a standardized recipe to get a consistent quality product, it is equally essential to follow procedures. It is also important to test the procedure in your school district kitchens using the equipment available.

RECIPE ADJUSTMENT

SHOW SLIDE: *Recipe Adjustment*

SAY: Each USDA standardized recipe lists the quantities needed to produce 50, 100, or the desired number of servings required to meet the needs of the operation. However, to meet each school's specific needs, it will be necessary to adjust recipes to serve the projected number of customers that are forecast on any given day. While many school managers have software in their schools that will adjust recipes for them, it is important to understand the process. In addition, directors should provide training on quantity adjustment for all staff members. To help you do this, formulated steps and a worksheet are provided in the Participant's Workbook.

SHOW SLIDE: Increasing the Ingredients in a Standardized Recipe

SAY: The following steps can be used to increase the ingredients in a standardized recipe.

Step 1: Determine the increase in the number of servings or yield needed.

Increase:

How many servings does the recipe currently yield? 100

How many servings are needed? 225

Step 2: Determine the multiplying factor for each ingredient.

Divide the number of servings needed by the number of servings listed.

Increase: $\frac{\text{number of servings needed}}{\text{number of servings listed}} = \frac{225}{100} = 2.25$

Step 3: Determine the total new quantity needed by multiplying the original weight/measure by the multiplying factor.

Multiply the weight or measure listed on the recipe by the multiplying factor to determine the new quantity needed.

Recipe Weight or Measure (converted) x Factor = Quantity Needed

Example: A recipe that serves 100 calls for 15 lb and 12 oz of ground beef.

Increase: Ground Beef: 15 lb 12 oz (252 oz) x 2.25 = 567 oz (35 lbs 7 oz)

Step 4: Repeat Step 3 for each ingredient in the standardized recipe.

Multiply each ingredient by the multiplying factor.

SHOW SLIDE: Decreasing the Ingredients in a Standardized Recipe

SAY: The following steps can be used to decrease the ingredients in a standardized recipe.

Step 1: Determine the decrease in the number of servings or yield needed.

Decrease:

How many servings does the recipe currently yield? 100

How many servings are needed? 80

Step 2: Determine the multiplying factor for each ingredient.

Divide the number of servings needed by the number of servings listed.

Decrease: $\frac{\text{number of servings needed}}{\text{number of servings listed}} = \frac{80}{100} = 0.80$

Step 3: Determine the total new quantity needed by multiplying the original weight/measure by the multiplying factor.

Multiply the weight or measure listed on the recipe by the multiplying factor to determine the new quantity needed.

Step 4: Determine the total new quantity needed by multiplying the original weight/measure by the multiplying factor.

Multiply the weight or measure listed on the recipe by the multiplying factor to determine the new quantity needed.

Recipe Weight or Measure (converted) x Factor = Quantity Needed

Example: A recipe that serves 100 calls for 15 lb and 12 oz of ground beef.

Decrease: Ground Beef: 15 lb 12 oz (252 oz) x .80 = 202 oz (12 lbs 10 oz)

Step 5: Repeat Step 3 for each ingredient in the standardized recipe.

Multiply each ingredient by the multiplying factor.

Source: ICN's *Basic Culinary Math*. <https://theicn.org/icn-resources-a-z/basic-culinary-math-for-school-nutrition-professionals/>

SAY: Increasing or decreasing spices or other seasonings during recipe adjustment may require a different proportion from other ingredients. The school nutrition director and school site manager should train food preparation employees to be careful when adjusting seasonings. In general, double the spices and herbs in a recipe when increasing from 50–100 servings. Increase the spice or herb by 25% for each additional 100 servings. Another ingredient that can be difficult to increase or decrease using the factor method is eggs. For example, if the recipe adjustment results in 1 $\frac{2}{3}$ eggs, rounding up to 2 eggs is usually fine.

Objective: Describe the importance of accurate weights and measurements in food production.

SHOW SLIDE: *Weights and Measures*

SAY: The weight/volume of each ingredient is an important part of a standardized recipe, and accuracy is essential to preparing quality products. Both weights and volumes for each ingredient are listed on most USDA recipes. Training staff to accurately weigh and measure ingredients is essential to producing a quality product. Weighing is faster, easier, and more accurate than measuring ingredients by volume. There is less chance for error if ingredients are weighed. *Ounce* and *pound* are the only two measures of weight that are used in cooking. Scales are used to measure ingredients by weight. The three types of scales are:

- Balance scales
- Spring scales
- Electronic scales

Most districts use portion cups, and sometimes there is concern that ingredients portioned in a 2 or 4 ounce portion cup do not equal 2 or 4 ounces by weight.

It is important that scales are standardized and handled with care. Scales should not be moved frequently or handled roughly. Such treatment can damage the scales, causing inaccurate readings. As a school nutrition director, it is your responsibility to see that employees, especially new hires, are trained in the proper techniques for weighing and measuring ingredients.

ICN's **Basics at a Glance** poster is a great training tool for employees. These materials should be available in every kitchen to help put your team on the road to quality food production. There is space provided in the Participant's Workbook to take notes if you wish.

SHOW SLIDE: *Activity: Basics at a Glance*

ACTIVITY: **Basics at a Glance**

Materials: Basics at a Glance poster

Time: 5–10 minutes

Instructions: Display the poster for all to see and briefly summarize information.

SAY: The **Basics at a Glance** poster is a valuable resource for school nutrition staff. It offers information on recipe abbreviations, volume equivalents for liquids, equivalent weights, portioning tools, measurement conversions, and steam table pan capacities.

We will briefly introduce some of the standard measuring equipment used in school nutrition kitchens.

- Measuring spoons are used to measure small amounts of ingredients such as seasonings, spices, herbs, and flavorings.
- Volume measurements are used mainly for liquid ingredients and ingredients in small amounts (less than 2 ounces).
- Liquid measures are used to measure large amounts of liquids. They have a lip for pouring to prevent spills and are usually made of aluminum, glass, or plastic. Liquid measures are available in 4 sizes: 1 pint, 1 quart, ½ gallon, and 1 gallon.
- Dry measuring containers are used to measure dry ingredients. These measures do not have a lip above the rim line so the ingredients can be leveled. Typically, dry measures are not purchased in sizes larger than 1 quart because it is more accurate to weigh large quantities of dry ingredients.

CYCLE MENUS

Objective: List the principles of using cycle menus.

SHOW SLIDE: Using Cycle Menus

SAY: A cycle menu “cycles” or repeats itself on a rotating basis of multiple days or weeks and offers different foods every day. However, they should be modified to incorporate the use of seasonal fruits and vegetables, as well as available USDA foods as needed. In SNPs, cycle menus are generally planned for as few as two weeks up to as many as six weeks. They save time, control food and labor costs, and allow menu planners to offer a variety of menu selections. Developing procurement specifications, forecasting, costing and purchasing procedures are standardized and more efficient with cycle menus. In addition, production staff will also become more skilled in producing repetitive menus as procedures become standardized.

Objective: Identify the importance of documenting and evaluating the amount of food planned, prepared, and served on food production records.

SHOW SLIDE: Food Production Records

Instructor's Note: *Productions records are different in each state, refer participants to their State agency for a copy of their state's approved production record.*

SAY: Good record keeping is part of successful food production procedures. Food production records provide a place for the manager to record information that communicates to the staff the food items and amounts to prepare and serve. When staff needs to know how much food to prepare for a given day and which recipe to use, the food production record provides this information. Since Federal SNPs receive reimbursement for all lunches, breakfasts, and snacks that conform to the meal patterns, the school food authority must provide documentation to the State and Federal government about the food and the amounts served. Food production records provide evidence that quantities of foods prepared and served support the meal pattern requirements. Additionally, these records are a major management tool that can be used to control costs, plan amounts of food to purchase, and forecast trends.

Because food production records provide documentation for SNPs, it is important that the school site staff understand the guidelines for completing food production records on a daily basis. Although the manager is ultimately responsible for the completion of the food production records, other members of the school nutrition staff can be assigned the job of helping complete them. It may be a good idea to cross train several employees in the process. ICN's *Managers Corner Production Records* is a great training tool for employees. Managers or directors can use the Managers Corner as a quick, 15-minute training for their employees. Each lesson includes an introduction, questions for the staff and an activity. Production records must provide certain information as required by USDA. Look at the Participant's Workbook at the **Required Information for School Meals Production** handout.

SHOW SLIDE: *Food Production Record Requirements*

SAY: Ultimately, the goal is to ensure that the entire food production record is complete at the end of the day the meal is served. The ability to accurately complete food production records is less after several hours or the next day. A good practice is to complete the production record before, during, or after the meal service.

SHOW SLIDE: Activity: Required Information for School Meals Production**ACTIVITY: Required Information for School Meals Production****Materials:**

- **Required Information for School Meals Production** handout
- Chart paper
- Markers

Time: 15 minutes

Instructions: Display the poster for all to see and briefly summarize information. Write each item of required information on chart paper. Divide participants into nine teams based on the nine required information items. Give each team 30 seconds to read the corresponding description. After 30 seconds give each team 1 minute to write down the corresponding description on their chart paper without using their Participant's Workbook as a guide. After the 1 minute, go over each chart paper and write down any missing information.

SAY: We will now work together as teams to identify the required information on a production record. I have written the required information items on chart paper. I will divide you into nine teams based on the required items for a production record.

DO: Divide participants into nine teams based on the nine required information items.

SAY: Each team will have 30 seconds to read the description to their item of required information. You will then have 1 minute to write down the corresponding description on your team's chart paper without using the Participant's Workbook as a guide.

DO: After the 1 minute, go over each chart paper and write down any missing information.

Required Information for School Meals Production

Instructions: You will be divided into nine teams based on the nine required items. Your team will have 30 seconds to read the corresponding description. Then, your team will have 1 minute to write down the corresponding description on your team's chart paper without using the Participant's Workbook as a guide. Finally, we will go over each chart paper and write down any missing information.

Production Record	Information
Basic Information	<ul style="list-style-type: none"> • Name of school/site • Grade group • Date • Menu • Menu type (lunch or breakfast) • Offer Versus Serve (OVS) or Pre-plated (served)
Reimbursable Meals	<ul style="list-style-type: none"> • Planned (projected) number of student meals—provides an estimate of planned (projected) student meals for the specified grade group • Actual number of student meals offered (prepared)—provides the total number of student meals offered (prepared) for the specified grade group • Actual number of student meals selected (served)—provides the total number of student meals selected (served) for the specified grade group
Nonreimbursable Meals	<ul style="list-style-type: none"> • Planned (projected) number of nonreimbursable meals—the number of staff and guests • Offered (prepared) number of nonreimbursable meals—the number of staff and guests • Actual number of nonreimbursable meals selected (served)—provides the total number of nonreimbursable meals selected (served) for the specified school/site
All Menu Items Listed	<ul style="list-style-type: none"> • Menu/Food Items—all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation • Planned (projected), offered (prepared), and selected (served) number of milk by type—fat-free unflavored, fat-free chocolate or other flavors, 1% low-fat unflavored, 1% low-fat chocolate or other flavors

Recipe/Product Number	<ul style="list-style-type: none"> • Recipe ID/product ID number—standardized recipe number (USDA or your local recipe number) or product • ID number
Portion Size	<ul style="list-style-type: none"> • Portion size for the specified grade group—specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.
Reimbursable Meal Component Provided by Portion Size	<ul style="list-style-type: none"> • Meats/meat alternates in ounce equivalent (oz eq) • Grains in oz eq (WGR indicates whole grain-rich) • Fruits—portion offered in volume, (½ cup in sample) • Vegetables—portion offered in volume (¼ cup in sample) • Milk—portion offered in volume (1 cup in sample)
Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover	<ul style="list-style-type: none"> • Planned (projected) number of servings to prepare—provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined) • Planned (projected) quantity of food to use in purchase units—forecasted from past production, standardized recipes and Food Buying Guide. Adjust on day-of-service, if needed • Actual number of servings offered (prepared)—provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed • Actual number of servings selected (served)—provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation • Substitutions and leftovers—any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)
Verification Signature and Date	<ul style="list-style-type: none"> • Person in charge of site reviews, verifies, signs and dates the production record, and files for future reference. Your State agency may require signed production records.

Adapted from *USDA's Anatomy of a Production Record* Appendix 4.A (2018, September)

SHOW SLIDE: *Activity: Food Production Record*

ACTIVITY: Food Production Record

Materials: Sample Daily Menu Production Record handout

Time: 5 minutes

Instructions: Refer participants to the **Sample Daily Menu Production Record** handout in the Participant's Workbook. Ask them to identify the required parts of a production record.

DO: Have participants share answers.

Sample Daily Menu Production Record

Instructions: Identify the required parts of the production record.

Daily Menu Production Record — Food Based Menu Planning

Name of school/state: _____
Grade Group: _____
Date: _____
Menu: _____

☐

Breakfast

☐

Lunch

☐

OVS

☐

Pre-plated
(served)

Reimbursable Meals

Number of student meals planned (projected): _____

Number of student meals offered (prepared): _____

Number of student meals selected (served): _____

Nonreimbursable Meals

Number of student meals planned (projected): _____

Number of student meals offered (prepared): _____

Number of student meals selected (served): _____

Menu/Food Item	Recipe ID/ Product ID	Portion Size	Component Contributions Per Portion Size					R = Reimbursable			NR = Nonreimbursable			T = Total			Substitutions, Leftovers, and Notes																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
			Meat/Meat Alternates	Grains	Fruits	Vegetables	Milk	R	NR	T	Planned (Projected) Servings	Planned (Projected) Quantity of Food (in purchase units)	R	NR	T	Actual Number Servings Offered (Prepared)		R	NR	T	Actual Number Servings Selected (Served)	R	NR	T																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							

Adapted from *USDA's Anatomy of a Production Record* Appendix 4.A

Verifier Signature

Date

Sample Daily Menu Production Record

Daily Menu Production Record — Food Based Menu Planning

SAMPLE

1 Name of school/state: Eagle's Nest Elementary.
2 Grade Group: K-5
3 Date: September 20, 2022
4 Menu: Grilled cheese sandwich or Chicken nuggets & Rice pilaf. Broccoli. Cherry tomatoes. Celery sticks. Fruit cocktail. Orange wedges
Milk: assorted fat-free & 1%

5

	Breakfast
	Lunch
	OVS
	Pre-plated

(served)

Reimbursable Meals
6 Number of student meals planned (projected): 50
7 Number of student meals offered (prepared): 45
8 Number of student meals selected (served): 45
Nonreimbursable Meals
9 Number of student meals planned (projected): 5
10 Number of student meals offered (prepared): 5
11 Number of student meals selected (served): 4

Menu/Food Item	Recipe ID/ Product ID	Portion Size	Component Contributions Per Portion Size					Planned (Projected) Servings			Planned (Projected) Quantity of Food (in purchase units)	Actual Number Serving Offered (Prepared)			Actual Number Servings Selected (Served)			Substitutions, Leftovers, and Notes
			16	17	18	19	20	R	NR	T		R	NR	T				
12 Menu/Food Item																		
Grilled Cheese Sandwich	R#32	1 ea	Meat/Meat Alternates	Grains	Fruits	Vegetables	Milk	R	NR	T	48 sl WG bread 3lb cheese	R	NR	T	R	NR	T	No leftovers, all children were offered both choices
XYZ Chicken Nuggets W/M/G, 3.97 oz = 2 oz MMA, 1 oz WG CN#123456	P#4203	#6 scoop (6 ea)	2 oz eq	2 oz eq WGR				24	5	35	5.6 lb	30	5	35	28	4	32	3 servings leftover, discarded
Brown Rice Pilaf, USDA recipe	R#B22	#8 scoop		1 oz eq WGR				32	5	37	1 gal	32	5	37	31	3	34	1 1/2 cups leftover, discarded
Steamed Broccoli Florets (RTU), dark green Vegetable	R#15	2 fl oz spoodle					1/4 C	50	5	55	1.75 lb	50	5	55	49	4	53	0.5 cup leftover; chilled and refrigerated for use in soup tomorrow
Cherry Tomato (3 ea) cleaned, RTU, ready-to-use, red orange vegetable	R#18	1/4 C					1/4 C	30		30	2.5 lb	30		30	24		24	1 1/2 cups cherry tomatoes & 21 cup celery leftover; bagged & refrigerated for use in soup tomorrow
Celery Sticks (3 ea, RTU) other vegetable		1/4 C					1/4 C	30		30	2.25 lb	30		30	26		26	
Fruit cocktail in light syrup; drained, USDA Foods	R#3	4 fl oz spoodle					1/2 C	35	3	38	2 #10 cans	35	3	38	25	3	28	Substituted peaches, 5 cups leftover; refrigerated for use in breakfast tomorrow
Diced Peaches, drained																		
Orange Wedges (138 count)	R#5	4 fl oz spoodle					1/2 C	15	3	18	4.5 lb	25	2	27	35	2	37	No leftovers; made 10 more servings, 3 more lb used
Extra: Ranch dressing 1/2 oz packets	P#1514	1 ea						54		54	54 ea	50		50	45		45	5 leftover; returned to inventory
Milk by type & flavor Fat-free (unflavored) Fat-free (chocolate) 1% (unflavored)	Item # 501 502 503	1 cup 1 cup 1 cup						5 30 10		5 30 10	5 30 10	5 28 10		5 28 10			5 28 10	No leftovers

Sample Daily Menu Production Record

Anatomy of a Production Record

If you're not clear about how to complete a production record, start by reviewing these details for each numbered item on the sample record.

BASIC INFORMATION

- 1 Name of school/site
- 2 Grade group
- 3 Date
- 4 Menu
- 5 Menu type (lunch or breakfast) and OVS or Preplated (served)

REIMBURSABLE MEALS

- 6 Planned (projected) number of student meals; provides an estimate of planned (projected) student meals for the specific grade group
- 7 Actual number of student meals offered (prepared) provided the total number of student meals offered (prepared) for the specified grade group
- 8 Actual number of student meals selected (served); provides the total number of student meals selected (served) for the specified grade

NONREIMBURSABLE MEALS

- 9 Planned (projected) number of nonreimbursable meals – the number of staff and guests
- 10 Offered (prepared) number of nonreimbursable meals the number of staff and guests
- 11 Actual number of nonreimbursable meals selected (served); provides the total number of nonreimbursable meals selected (served) for the specified school/site

ALL MENU ITEMS LISTED

- 12 Menu/food items – all food item choices offered on the specified grade group's menus, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include production information such as manufacturer item name and code number, USDA Food information, or specific information to guide preparations
- 13 Planned (projected), offered (prepared), and selected (served) number of milk by type—fat-free, 1% low-fat unflavored, 1% low-fat chocolate or other flavors

RECIPE/PRODUCT NUMBER

- 14 Recipe ID/product ID number – standardized recipe number (USDA or your local recipe number) or product ID

RECIPE/PRODUCT NUMBER

- 15 Portion size for the specified grade group – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.

REIMBURSABLE MEAL COMPONENTS PROVIDED BY PORTION SIZE

- 16 Meats/meat alternates in ounce equivalent (oz eq)
- 17 Grains in oz eq (WG indicates whole grain-rich)
- 18 Fruits – portion offer in volume, ($\frac{1}{2}$ cup in sample)
- 19 Vegetables – portion offer in volume ($\frac{1}{4}$ cup in sample), note that subgroup is identified in column #14
- 20 Milk – portion offered in volume (1 cup in sample)

MEALS PLANNED (PROJECTED), OFFERED (PREPARED), SELECTED (SERVED), AND LEFTOVER

- 21 Planned (projected) number of servings to prepare – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined)
- 22 Planned (projected) quantity of food to use in purchased units – forecasted from past production, standardized recipes, and Food Buying Guide. Adjust on day-of-service, if needed
- 23 Actual number of servings offered (prepared) – provided total number of servings prepared with any changes from planned (projected) amounts noted, as needed
- 24 Actual number of servings selected (served) – provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation
- 25 Substitutions and leftovers – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (*examples: chilled and refrigerated for use in future meal, frozen for future use in cycle menu, or discard*)

VERIFIER SIGNATURE & DATE

- 26 Person in charge of site review, verifies, signs, and dates the production record, and files for future reference. Your State agency may require signed production records

OTHER DETAILS YOU MAY NEED OR WANT TO RECORD ARE:

- Food preparation and holding temperatures
- Specific information of value for preparation, service, and future forecasting, such as weather-related school closures, field trips, etc.
- Food Buying Guide details – source of calculations for purchase units required for total servings planned
- Additional required information by your State agency or school program

The sample is one example of production record. Use the format that best fits your programs.

Adapted from USDA's *Anatomy of a Production Record* Appendix 4.A

WORK PRODUCTION SCHEDULE

Objective: State the importance of production scheduling to achieve operational goals.

SHOW SLIDE: *Types of Production Schedules*

SAY: We will discuss three types of production schedules:

- Work Production Schedule
- Cleaning Schedule
- Service Line Food Placement Diagram

SHOW SLIDE: *Work Production Schedule*

SAY: The daily production of school nutrition meals must be well-organized. It is important for the school nutrition director to work with school sites to develop detailed plans for the production and service of quality meals for children. A work schedule, sometimes called a production schedule, is an excellent tool to help employees stay on task. This type of schedule is different from the production record that captures the amount of food prepared.

SHOW SLIDE: *Importance of a Work Production Schedule*

SAY: A work production schedule tells each school nutrition employee everything necessary to prepare for meal service, including any pre-preparation for the following day and a time standard for each task. It is the responsibility of the school nutrition director to work with school site managers to determine the approximate time needed to complete a task in order to schedule time appropriately.

SHOW SLIDE: *Activity: Daily Work Schedule for Food Production and Service*

ACTIVITY: Daily Work Schedule for Food Production and Service

Materials: Daily Work Schedule for Food Production and Service handout

Time: 5 minutes

Instructions: Refer participants to look over the **Daily Work Schedule for Food Production and Service** handout in the Participant's Workbook. Ask participants to share their suggestions.

SAY: Take a minute to look over the **Daily Work Schedule for Food Production and Service** handout in the Participant's Workbook. Then, with your table group, discuss any recommended modifications, additions, or deletions to the schedule.

DO: Call on one person from each table to share suggestions.

Daily Work Schedule for Food Production and Service

Instructions: Identify any modifications, additions, or deletions to the schedule you would recommend.

Time	Janie (Manager)	May	Bob	Anna
7:00 AM	Breakfast	Breakfast	Make Cookies	Breakfast Cashier
7:30 AM			Dish Room	
8:00 AM	Paper Work	Prepare BBQ	Make Rolls Bake Cookies	Salad Preparation
8:30 AM	Supervision			
9:00 AM		Wash Apples		Prep Corn
9:30 AM		Dish Peaches	Make BBQ/Buns	Pan Pizza
10:00 AM	Supervision/Line Set-Up	Set Up Line	Set Up Line	
10:30 AM – 12:30 PM	Lunch	Lunch	Lunch	Lunch
1:00 PM	Paper Work	Clear/Clean Line	Clean Kitchen	Dish Room
1:30 PM	Count Money			Count Money
1:45 PM	Place Orders	Check In Milk Delivery		
2:00 PM	Supervise	Breakfast Prep	Next Day Prep	Dining Area Check
2:30 PM	Close Up			

FEEDBACK:

- The BBQ preparation is listed twice: May at 8:00 am and Bob at 9:30 am.
- No one is assigned to bake the pizza.
- Someone might be needed in the dish room prior to 1:00 pm.
- Breaks should be included.

SHOW SLIDE: Cleaning Schedules

SAY: Cleaning schedules are a way of organizing daily, weekly, and special cleaning tasks. School nutrition directors should develop uniform blank schedules for each category and provide them to school sites for completion. Look in the Participant's Workbook for an example of a weekly cleaning schedule. This format can be adapted for daily or seasonal schedules. Most school sites have some cleaning tasks related to food production that are designated seasonal. For example, food items may be removed from pantry areas that are difficult to gain access to in order to thoroughly clean and reorganize prior to each school year. These schedules are best posted at the time the task is to take place.

DO: Briefly go over the **Weekly/Daily Cleaning Schedule** worksheet with participants.

ASK: What other cleaning tasks can be added to the list for weekly cleaning? What about daily cleaning?

FEEDBACK:

- Drain and clean the icemaker.
- Put enzymes in floor drains.
- Add daily: clean the bathrooms, service line, dish room, and kitchen surfaces.

Weekly/Daily Cleaning Schedule

Instructions: Identify other cleaning tasks can be added to the list for weekly and daily cleaning.

Employee:		
Day to Clean	Cleaning Task	Initials – Complete
Monday	Pantry	
Tuesday	Service Line 1 and Milk Bin	
Wednesday	Bathroom	
Thursday	Refrigerator – Service Line 1	
Friday	Back Porch, Dock, and Garbage Cans	
Employee:		
Day to Clean	Cleaning Task	Initials – Complete
Monday	Bathroom	
Tuesday	Service Line 2, Milk Bin, and Ice Cream Freezer	
Wednesday	Dish room	
Thursday	Refrigerator – Service Line 2	
Friday	Windows on Service Line	
Employee:		
Day to Clean	Cleaning Task	Initials – Complete
Monday	Bread Rack/Storage Bin	
Tuesday	Mixers and Area	
Wednesday	Convection Ovens	
Thursday	Bathroom	
Friday	Refrigerator – Kitchen	
Employee:		
Day to Clean	Cleaning Task	Initials – Complete
Monday	Back Porch, Dock, and Garbage Cans	
Tuesday	Deep Fryers, Clean/Rotate Stove Top, and Milk Bin	
Wednesday	Tables and Stools	
Thursday	Freezer – Walk-In	
Friday	Bathroom	
Employee:		
Day to Clean	Cleaning Task	Initials – Complete
Monday	Vent Hood	
Tuesday	Bathroom	
Wednesday	Convection Ovens and Food Carts	
Thursday	Freezer – Walk-In	
Friday	Stainless Steel Tables	
<p>School Nutrition Frontline Staff will be responsible for surfaces of equipment and mopping and sweeping floors in their assigned areas. The manager will inspect all areas of the kitchen at least once a week.</p> <p>Date of kitchen inspection: _____</p>		

DO: Allow time and encourage participants to make modifications, additions, and/or recommendations to the schedule in their Participant's Workbook.

Instructor's Note: *This schedule is provided as an example for discussion.*

SAY: A third scheduling tool that is often used to keep meal service organized and efficient is a service line food placement diagram. It is recommended that the school nutrition director work with managers to design a service line food placement diagram that can be standardized for a set period of time or individualized according to the menu. Work with the managers in your district to customize or design a schedule that communicates to all employees how the line should be set up.

SHOW SLIDE: **Activity: Service Line Food Placement Diagram**

ACTIVITY: Service Line Food Placement Diagram

Materials: Service Line Food Placement Diagram worksheet

Time: 10 minutes

Instructions: Refer participants to the **Service Line Food Placement Diagram** worksheet in the Participant's Workbook. Ask participants to use the menu, draw a service line for menu item placement, with pan openings and counter space that corresponds to the service line.

DO: Allow time for drawing and discussion of potential areas of improvement.

Service Line Food Placement Diagram

Date: _____ Service Line Time: _____

Meal: (Breakfast, Lunch, Other) _____

Roasted Chicken

Baked Sweet Potato

Green Salad

Orange Smiles

Fresh Strawberries

Whole Grain Roll

Choice of Milk

Instructions: Draw service line with food placement. Design with the pan openings and other serving counter space so the diagram corresponds to your service line.



Pan Sizes:

Portion:

Tools:

Server:

ASK: What are some factors to consider when setting up a service line?

FEEDBACK:

Possible Responses:

- Color of foods
- Temperature of foods
- Vegetables first

ASK: What can be done to make the service line an inviting area?

FEEDBACK:

Possible Responses:

- Decorate the service line
- Place posters on the line

Objective: List food quality standards that ensure quality food production.

SHOW SLIDE: *Food Quality Standards*

SAY: Foods that look good can entice students to select healthy school meals. School nutrition staff trained in food preparation is essential to the success of any quality assurance program. A well-trained food production staff should be able to:

- Prepare foods of high quality to meet the established standards.
- Understand the relationship of time and temperature to the maintenance of the quality of foods held for service on the line.
- Take appropriate measures to ensure that the quality meets the expectations of the customer and the program. For example, cold foods should be prepared first, and hot foods should be prepared last. By utilizing this technique, hot foods will not be in the warmer for an extended period of time. This will also help minimize the possibility of a substandard product.

SHOW SLIDE: Food Quality and Performance Assessment

SAY: We all know that directors cannot be in every school every day to supervise, but they are ultimately responsible for the integrity of the program. Reviewing completed production records will ensure that:

- The menu is being followed.
- High quality meals that meet students' nutrition needs and wants are being served.
- Fiscal accountability is maintained.

The **Food Quality and Performance Assessment Template** in the Participant's Workbook is an aid to help you monitor the school site. Directors need to know what is happening at the school site. Your visits demonstrate the value you as the director place on the program where the "rubber meets the road," and the value you place on the staff who are on the front line every day.

Use the **Food Quality and Performance Assessment Template** to evaluate the food production program at schools during an unannounced visit. Mark **Yes** when the food meets the district's standards and **No** when it does not. Use the **Comments** section to explain why the standard was not met and what action is required. The evaluation should be discussed with the manager.

DO: Go over the assessment briefly and ask if there are questions or comments. Allow limited discussion.

Food Quality and Performance Assessment Template

School: _____

Date: _____

Manager: _____

Meal Service: Breakfast _____ Lunch _____ Snack;: _____

Food Quality/Quantity

- | | |
|---|--------------------|
| 1. Is the district menu plan being followed? | Yes _____ No _____ |
| 2. Are USDA and/or standardized recipes being followed? | Yes _____ No _____ |
| 3. Is batch cooking being done? | Yes _____ No _____ |
| 4. Are correct portion sizes for the reimbursable meal being offered? | Yes _____ No _____ |
| 5. Do salads and fresh fruit look fresh and appealing? | Yes _____ No _____ |
| 6. Are all food items palatable and appealing to the eye? | Yes _____ No _____ |
| 7. Is the work area safe? | Yes _____ No _____ |
| 8. Are hand wash sinks easily accessible? | Yes _____ No _____ |

Food Temperatures/Food Safety Program

- | | |
|--|--------------------|
| 1. Is a food safety program in place to ensure correct temperatures? | Yes _____ No _____ |
| 2. Hot Entrée #1 _____ | |
| Is the holding temp >135 °F? | Yes _____ No _____ |
| 3. Hot Entrée #2 _____ | |
| Is the holding temp >135 °F? | Yes _____ No _____ |
| 4. Hot Vegetable _____ | |
| Is the holding temp >135 °F? | Yes _____ No _____ |
| 5. Cold Food Item _____ | |
| Is the holding temp <41 °F? | Yes _____ No _____ |
| 6. Cold Beverage _____ | |
| Is the holding temp <41°F? | Yes _____ No _____ |

Food Temperatures/Food Safety Program, continued

7. Are internal cooking temperatures recorded? Yes _____ No _____
8. Are there any menu substitutions? Yes _____ No _____

Production Records

Are production records:

1. Accurate? Yes _____ No _____
2. Legible? Yes _____ No _____
3. Up-to-date? Yes _____ No _____
4. Accurately completed? Yes _____ No _____
5. Are substitutions recorded? Yes _____ No _____
6. Are portion sizes correct? Yes _____ No _____

Presentation Marketing and Merchandising

1. Is the food attractively displayed (no foil or film, correct pan size, etc.)? Yes _____ No _____
2. Is the serving line clean during service? Yes _____ No _____
3. Are staff neatly dressed and following the school's dress code? Yes _____ No _____
4. Is the serving line decorated to enhance the atmosphere of serving area? Yes _____ No _____

Comments

Manager: _____

Director/Supervisor: _____

SAY: After you complete the assessment, it is important to give feedback to the manager. Go over the form. Give suggestions for implementing improvements and praise when excellence is observed. Share the assessment with the principal to encourage administrator support of staff.

SHOW SLIDE: ICN and CIGN Resources

SAY: The Institute of Child Nutrition offers a variety of resources to assist you in Food Production. The ICN's *Child Nutrition Recipe Box* is your go-to source for recipes developed by the USDA, States, and territories. Check out the CNRB at theicn.org/cnrb. Additionally, the ICN's Culinary Institute of Child Nutrition provides numerous resources to enhance your team's culinary skills, including *Menus of Flavor* and the *USDA Recipe Standardization Guide for Child Nutrition Programs*. Check out the CIGN at theicn.org/cign for more culinary resources.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

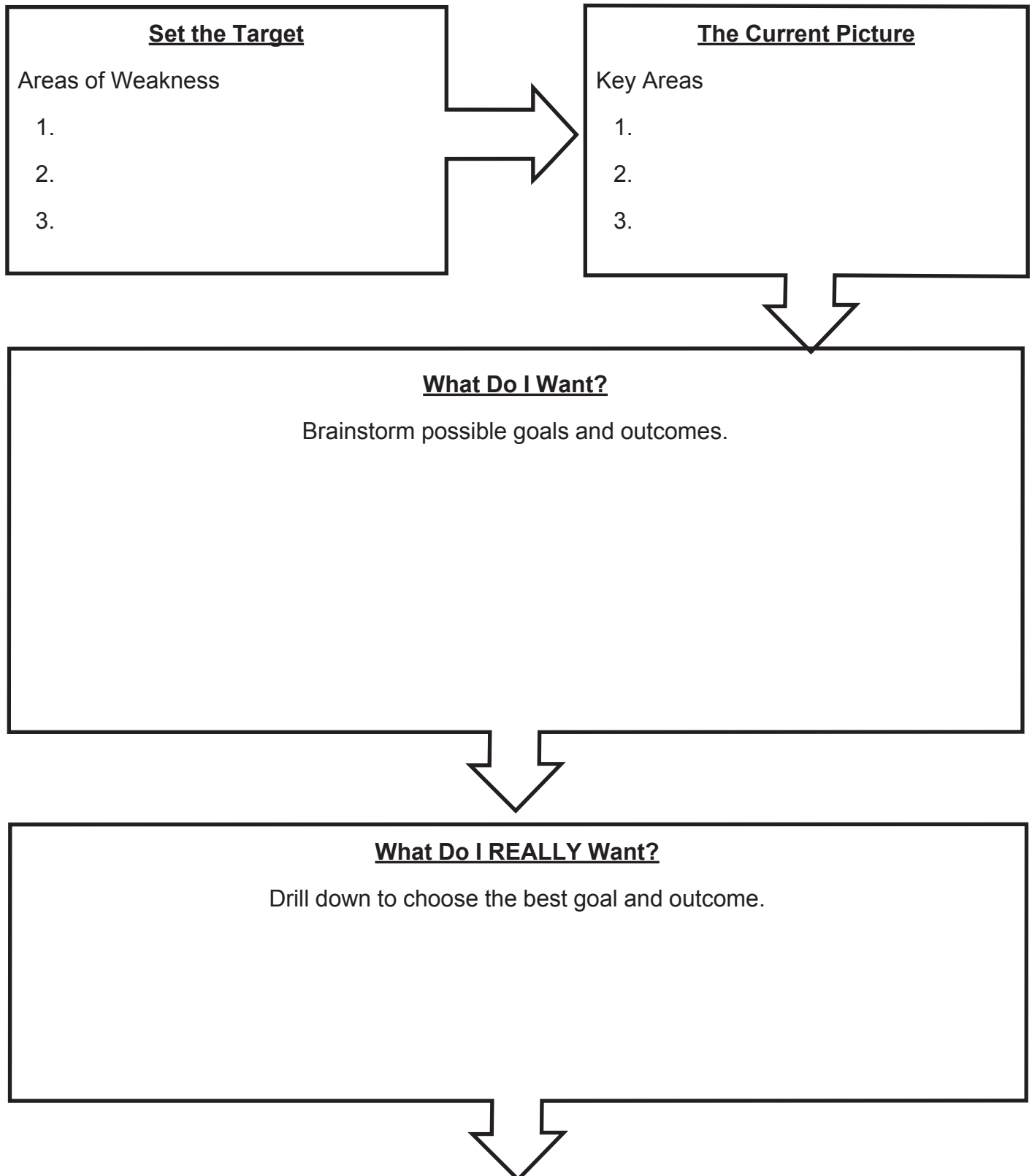
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Food Production. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Food Production** worksheet.

SMART Goals for Food Production



SMART Goals for Food Production, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u></p> <p>How will I do it?</p> <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? 	
<p><u>MEASURABLE</u></p> <p>How will I measure it?</p> <ul style="list-style-type: none"> • How much? • How many? • How will I know it has been accomplished? 	
<p><u>ACHIEVABLE</u></p> <p>Is this something I can do?</p> <ul style="list-style-type: none"> • Am I prepared to make the commitment? • Am I willing to make major changes? • Is there a more achievable goal? 	
<p><u>RELEVANT</u></p> <p>Is this based on forecasted needs?</p> <ul style="list-style-type: none"> • Do I have the resources? • Does it make sense for my program? • Does it align with my priorities and needs? 	
<p><u>TIME-BOUND</u></p> <p>Does the time frame create a practical sense of urgency?</p> <ul style="list-style-type: none"> • What can I do TODAY to reach my goal? • What can I do one week from now? • What can I do one month from now? 	
<p>MY SMART GOAL IS:</p> <div style="height: 150px; border: 1px solid black; margin-top: 10px;"></div>	

Procurement and Inventory Management for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 3 ½ hours



Key Area: 2 (Operations)

USDA Professional Standards Codes: 2400, 2510

2024

11/25/2024

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Identify the stakeholders in the school nutrition food chain.
- Discuss procurement considerations of a well-planned menu.
- Recognize key information when forecasting menu items' usage.
- Discuss product descriptions and create a mock product description.
- Identify various types of acceptable purchasing methods, including Federal procurement regulations, policies, and procedures governing all SNP purchases.
- Identify ethical behaviors.
- Recognize general inventory management practices.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify the stakeholders in the school nutrition food chain.			
40 minutes	<ul style="list-style-type: none"> Lesson objectives Stakeholders Stakeholder's Responsibilities 	<ul style="list-style-type: none"> Review Objectives Stakeholders 	Participant's Workbook
Objective: Discuss procurement considerations of a well-planned menu.			
15 minutes	<ul style="list-style-type: none"> Menus Cycle Menus Product Codes or Stock Keeping Units Standardized Recipes 		Participant's Workbook
Objective: Recognize key information when forecasting menu items' usage.			
30 minutes	<ul style="list-style-type: none"> Forecasting Product Labeling Velocity Report Past, Present, and Future 	Forecasting: Past, Present, and Future	Participant's Workbook
Objective: Discuss product descriptions and create a mock product description.			
35 minutes	<ul style="list-style-type: none"> Product Descriptions Standards of Identity Formal IFB RFP Noncompetitive Procurement Fixed-Price Contract Cost-Reimbursable Contract 	Bean Burrito Product Description	Participant's Workbook
Objective: Identify various types of acceptable purchasing methods, including Federal procurement regulations, policies, and procedures governing all SNP purchases.			
40 minutes	<ul style="list-style-type: none"> Bid Integrity Methods of Procurement Small Purchases Bids Request for Proposal Contracts 	<ul style="list-style-type: none"> Competitive Procurement Service Line Food Placement Design 	Participant's Workbook
Objective: Identify ethical behaviors.			
20 minutes	<ul style="list-style-type: none"> Ethics Gifts and Gratuities Conflicts of Interest Confidentiality 		Participant's Workbook

Time Allowed	Topic	Activity	Materials
Objective: Recognize general inventory management practices.			
30 minutes	<ul style="list-style-type: none"> • Inventory Management • Food Buying Guide and Calculator • Conclusion – SMART Goals 	Inventory Management Best Practices	<ul style="list-style-type: none"> • Participant's Workbook • Chart Paper
Total: 3 ½ hours			

Procurement and Inventory Management

SHOW SLIDE: *Procurement and Inventory Management*

SAY: Welcome to Procurement and Inventory Management. In this lesson, we will provide an overview of the procurement and inventory management process covering the following topics: stakeholders, good procurement, forecasting, and so much more. We will now cover the objectives for this lesson.

SHOW SLIDES: *Lesson Objectives and Lesson Objectives, continued*

DO: Review the objectives for this lesson.

SHOW SLIDE: *What Is Procurement?*

SAY: Procurement is a multi-step process for obtaining goods, products, and/or services at the best possible price. Proper planning before procuring a good or service is worthwhile and has a critical role in the district's ability to obtain consistent products and services at the lowest possible cost. The benefits of a well-planned solicitation help the district to effectively use its resources and ensure the procurement is consistent with applicable laws.

Adequate planning can also help to ensure competitive procurement.

A systematic approach to procurement is essential to making sure that you know how much product is needed, prior to releasing the solicitation. If you do not use a systematic approach you may not have what you need when you need it.

SHOW SLIDE: *SNPs*

SAY: School nutrition programs (SNPs) are federally assisted programs that must be operated in compliance with Federal, State, and local guidelines. It is important to allow adequate time when completing the bid process as some states require that all documents used in the solicitation to be reviewed prior to distribution to prospective respondents. Federal regulations also require some contracts to be reviewed by the State agency prior to execution.

ASK: What are some considerations when procuring goods, products, or services?

FEEDBACK:

Possible answers may include:

- Type of product
- Quantity of product
- Number of deliveries per week
- Storage capacity
- Product descriptions
- Cost of the product

SHOW SLIDE: Key Terms

DO: Refer participants to the **Key Terms** handout.

SAY: This comprehensive list of terms and definitions will be an invaluable resource for reference. We will not cover all of these terms in today's lesson, but I would like you to take a look at this list and see if there are any terms which you are unfamiliar with or do not understand. There are a few terms I want to draw your attention.

Key Terms

Buy American	The Buy American provision [in section 12(n) of the National School Lunch Act] requires schools to purchase, to the maximum extent practicable, domestic commodities and products. A domestic commodity or product means an agricultural commodity that is processed in the United States, and/or a food product that is processed in the United States substantially using agricultural commodities that are produced in the United States. Purchases made in accordance with the Buy American provision must still follow the applicable procurement rules calling for free and open competition. Any entity that purchases food or food products on behalf of the school food authority (SFA) must follow the same Buy American provisions that the SFA is required to follow.
Code of Conduct	A code of conduct is a set of rules outlining the responsibilities of, or proper practices for, an individual or organization. Grantees and sub grantees will maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. An SFA must have a code of conduct governing the performance of the officers, employees, or agents engaged in contract awards and administration when the contract is funded in whole or in part by Food and Nutrition Service (FNS) program funds. In addition, this code governs the methods of procurement, establishes the requirement that the SFA perform a cost or price analysis for every procurement (including contract modifications), and determines which contract clauses and certifications are required in the SFA's contracts.
Material Change	A material change is a change made to a contract after the contract has been awarded that alters the terms and conditions of the contract substantially enough, that, had other respondents (vendor/bidder) known of these changes in advance, they may have bid differently and more competitively.

Responsive and Responsible Respondent (Vendor/Bidder)	To be considered responsive, a respondent must submit a response to the Invitation for Bid (IFB) or Request for Proposal (RFP) that conforms to all material terms and conditions of the solicitation. To be considered responsible, a respondent must be capable of performing successfully under the terms and conditions of the contract. In order to be awarded a contract, a respondent must be responsive and responsible.
Standards of Identity (SOI)	Standards of Identity (SOIs) for foods are Federal requirements that define what a food product is, its name, and the ingredients that must or may be used in the manufacture of that food. SOIs protect consumers by ensuring labels accurately describe the products contained within the package.
Stock Keeping Units (SKU)/ Product Code	A stock keeping unit (SKU) or product code is a unique identifier for each unit of product. The SKU is usually the product code.
Forecasting	Forecasting is the process of analyzing current and historical data to determine future trends. In the case of SNPs, forecasting involves predicting and estimating the goods, works, and services needed in specified areas for the coming year, and/or assessing needs by reviewing current procurement activities. Forecasting also includes determining the number of servings to prepare, how often to order chemical supplies, or the projection of equipment service maintenance.

SHOW SLIDE: Principles of Good Procurement

SAY: The three principles of good procurement are:

- Full and open competition
- Fairness and integrity
- Responsive and responsible bidders

All procurement transactions must be conducted in a manner that provides full and open competition consistent with procurement standards. Full and open competition means that all suppliers have the same opportunity to compete.

SHOW SLIDE: Fairness and Integrity

SAY: Fairness and integrity in all aspects of the procurement process are critical to achieving full and open competition. Competitive procurement seeks responses from qualified suppliers who are capable of meeting the terms and conditions of the contract. Congress requires school foods to be American grown or raised. This requirement, in addition to buying American products, supports American agriculture and ensures that products meet American health and safety regulations.

SHOW SLIDE: Buy American Requirements

SAY: For school meal programs, SFAs are required to Buy American. This provision means that SFAs must purchase food that is grown, raised, or that it is processed in the US, and contains agricultural products “substantially” from the US. Meaning at least 51% of the food used in the product is grown domestically. Adherence to this provision is monitored by State agencies during the Administrative Review process. There are limited exceptions for products not produced in the US, insufficient quantity and quality, or if competitive bids show that the price is significantly higher than the domestic product. The Final Rule, “Child Nutrition Programs: Meal Patterns Consistent With the 2020–2025 Dietary Guidelines for Americans” separates the two limited exceptions as follows:

- The product is listed on the Federal Acquisitions Regulations Non-available articles list found at 48 CFR 25.104 and/or is not produced or manufactured in the U.S. in sufficient and reasonably available quantities of a satisfactory quality; or
- Competitive bids reveal the costs of a U.S. product are significantly higher than the non-domestic product.

SFAs are required to document the reasons why any product does not meet the Buy American requirement and should use these exceptions as a last resort.

SHOW SLIDE: Buy American: Threshold on Non-Domestic Food Purchases

SAY: For The Final Rule, “Child Nutrition Programs: Meal Patterns Consistent with the 2020–2025 Dietary Guidelines for Americans” USDA established a new threshold for school food authorities that use exceptions. The limit on the percent of **total** commercial food costs from non-domestic foods will be phased in over 7 school years.

- Beginning on July 1, 2025, the non-domestic food purchases cap will be 10 percent.
- Beginning on July 1, 2028, the non-domestic food purchases cap will be 8 percent.
- Beginning on July 1, 2031, the non-domestic food purchases cap will be 5 percent.

This phased-in approach will allow schools to gradually adjust to the new requirement and will allow USDA to continue to collect data on use of the Buy American exceptions. Items listed on the Federal Acquisitions Regulations Non-available articles list **must be counted** toward the cap on non-domestic purchases when it goes into effect.

SHOW SLIDE: Why Is Competition Important?

ASK: Why is competition important?

FEEDBACK:

Possible answers include:

- Competition is required for any purchase made using Federal dollars.
- Companies can differentiate themselves from other vendors based on the range of products and services you require.
- Full and open competition will give you the best product or service for the best price.

SHOW SLIDE: Procurement Plan**SAY:** The plan will:

- Tell you what to do
- Tell you when to use your procurement process
- Provide documentation of how your processes follow Federal and State guidelines
- Give policies on ethics and how to respond to complaints (Code of Conduct)
- Answer procedural questions

Objective: Identify the stakeholders in the school nutrition food chain.**SHOW SLIDE: Who Are the Stakeholders?****ASK:** Who are the stakeholders in the school nutrition procurement process?**FEEDBACK:**

Possible answers include:

- School Nutrition Procurement Team
- Distributors
- Brokers
- Manufacturers
- Local farmers
- State agency
- U.S. Department of Agriculture (USDA)

DO: Refer participants to the **Stakeholders** handout in the Participant's Workbook.

Stakeholders

School Nutrition Team

May include the school nutrition director, the managers, the school nutrition staff, the business manager, a procurement office and school board members

The Distributor

A commercial food company that purchases, receives, and/or stores commercial food products:

- Sells, delivers, and bills the recipient agency for goods and/or services provided
- Sells the products made by manufacturers
- Secures the best price for the district within the financial boundaries of the company
- Possesses wealth of knowledge and experience and can recommend some procedures to maximize the supply chain efficiency
- Reduces overall cost of deliveries for both the distributor and the school district by initially contracting for larger delivery sizes
- Saves money on fuel and labor and helps district reduce the labor cost in receiving multiple deliveries
- Provides a statement of the products purchased or a velocity report for the district
- Identifies ways to reduce stock keeping units or product codes, thus saving the district money and reducing inventory
- Seeks to become the recipient of prime distributor awards but cannot help in the preparation of the bid

The Broker

Independent sales agents who negotiate sales for manufacturers by working with food distributors and school nutrition operations.

- Assists manufacturers by introducing new products to the school nutrition market and distributing product and ingredient information
- Assists the SFA staff by providing samples for taste testing to the districts
- **Works to ensure that the process of getting the product to the distributor occurs in a timely and accurate fashion. Adequate lead time for the distributor and broker will help avoid hectic and rushed situations.

**As the agent for awarded products

The Manufacturer

Companies responsible for processing raw products, developing new products, and sending finished products to distributors. In some cases, customers are allowed to purchase directly from the manufacturer when volume warrants.

- Contributes to the supply chain process by providing the products to the distributor. This may entail shipping the product from another geographic location or actually producing the product.

State Agency

Responsible for administering school nutrition programs, reviewing procurement procedures, reviewing and approving each contract (including supporting documentation) between a SFA and Food Service Management Company (FSMC), providing procurement updates and training, and is a point of contact for information concerning procurement questions.

The U.S. Department of Agriculture (USDA)

Oversees the administration of the Child Nutrition Programs and the Food Distribution Programs. USDA Foods are available to any school that participates in a USDA SNP. USDA Foods can account for 15% to 20% of the foods in SNPs and are 100% American grown. It is critically important to determine how and when USDA Foods will be incorporated into the menu before you decide how much commercial food you want to purchase. Improvements to USDA Foods keep pace with current nutrition and health advancements and coincide with the principles established in the Dietary Guidelines for Americans. USDA offers canned, frozen, fresh, dry, and refrigerated products; a variety of package sizes; and healthy new options that meet meal pattern requirements.

SHOW SLIDE: Stakeholders' Expectations

SAY: All of the stakeholders share a common goal—a healthy school environment, but each stakeholder has a specific role in the food supply chain. Each stakeholder operates as an independent business and each has its own mission and specific sustainability goals. We are now going to do an activity which will give you an opportunity to try on some different stakeholder's roles.

SHOW SLIDE: Activity: Stakeholders' Responsibilities**ACTIVITY: Stakeholders' Responsibilities**

Materials: Stakeholders' Responsibilities handout

Time: 10 minutes

Instructions: Divide the participants into six groups of six people. Refer participants to the **Stakeholders' Responsibilities** handout in the Participant's Workbook.

DO: Have the participants in each group count off by six. Assign one of the following stakeholders to each person in the group: The School Nutrition Procurement Team, Distributors, Brokers, the State Agency, Manufacturers, and the U.S. Department of Agriculture (USDA). With each person assuming their role, give them this assignment. Allow 5 minutes to complete the activity. At the conclusion of the activity, ask participants to provide a few of the responsibilities for each stakeholder. With each person assuming their role, discuss ways to provide more whole grain-rich products and your concerns with taking on this new venture.

SAY: SFAs need to find more whole grain-rich products. Using the **Stakeholders' Responsibilities** chart in the Participant's Workbook, discuss your role in providing more whole grain-rich products and your concerns in taking on this new venture.

Stakeholders' Responsibilities

Stakeholder	Responsibilities
<p>School Nutrition Team</p> <p>may include the school nutrition director, managers, school nutrition staff, business manager, a procurement officer, and school board members</p>	<ul style="list-style-type: none"> • Planning menus and incorporating USDA Foods • Forecasting the needs of the school nutrition operation • Developing procurement solicitation documents in adequate time to allow for full and open competition • Participate in pre-bid meetings as needed • Evaluating responses to solicitations to ensure that the most responsive and responsible companies receive the business • Assessing equipment needs, optimizing product or unit codes for similar products, determining product specifications • Completing procurement arrangements, ordering products, scheduling and accepting deliveries using good receiving procedures • Working with vendors to limit emergency orders • Complying with Federal and State regulations for procurement
<p>Distributor</p> <p>commercial food company that purchases food and resells it to customers</p>	<ul style="list-style-type: none"> • Purchasing, receiving, and storing foods as needed. May store and deliver USDA Foods • Providing product information, estimates of product usage, and technical assistance • Billing for purchases made • Processing discounts, credits, and rebates
<p>Brokers</p> <p>independent sales agents who negotiate sales for manufacturers by working with food distributors and school nutrition operations</p>	<ul style="list-style-type: none"> • Planned (projected) number of nonreimbursable meals – the number of staff and guests • Offered (prepared) number of nonreimbursable meals – the number of staff and guests • Actual number of nonreimbursable meals selected (served) – provides the total number of nonreimbursable meals selected (served) for the specified school/site
<p>Manufacturers</p> <p>commercial companies that process raw products into finished product for sale to customers</p>	<ul style="list-style-type: none"> • Providing quality and safe foods • Ensuring competitive pricing • Developing new products • Incorporating USDA foods into processed products • Communicating information about product packaging, formulations, product recalls, and discontinued products • Documenting CN Labeled product ingredients

State Agency the agencies responsible for administering the Child Nutrition and Food Distribution Programs	<ul style="list-style-type: none"> • Administering and monitoring the Child Nutrition Programs in schools and institutions • Reviewing procurement procedures and actions • Providing guidance and technical assistance to SFAs on procurement • Reviewing and approving contracts with Food Service Management Companies
United States Department of Agriculture (USDA) the Federal agency responsible for the administration of the Child Nutrition and Food Distribution Programs	<ul style="list-style-type: none"> • Establishing regulations which translate laws into operational policy • Coordinating the distribution of USDA Foods to State agencies • Providing children and needy families with better access to food

Objective: Discuss procurement considerations of a well-planned menu.

SAY: Now that we have discussed the stakeholders' expectations and responsibilities, it is important to discuss how the menu affects the procurement process.

SHOW SLIDE: Menus

SAY: The menu is also the driving force behind the procurement process. It must meet all Federal guidelines and be appealing to the customer. To have the right foods on hand when you need them consider:

- Lead time for deliveries
- Storage capacity
- Equipment
- Food costs
- Cultural food preferences
- Labor costs
- Skill levels of staff
- Environmental friendliness
- The availability of USDA Foods

SHOW SLIDE: Cycle Menus

SAY: Cycle menus provide the opportunity to analyze menu items and determine similarities among recipes. They can help school nutrition staff become familiar with frequently used standardized recipes, and learn preparation efficiencies for producing a quality product. In addition, cycle menus also provide more predictability in what to buy and when you need to buy it.

ASK: If you are using a cycle menu, how long is the cycle?

DO: Allow participants to provide responses.

ASK: How do you think that cycle menus can help in the procurement process?

FEEDBACK:

- Make the ordering process easier
- Control inventory
- Make it easier to know which USDA Foods to order

SHOW SLIDE: Product Codes or Stock Keeping Units (SKUs)

SAY: The menu planner strives to determine multiple uses for the same product. Products used are tracked by product codes, unit codes, or stock keeping units (SKUs). These codes are a unique identifier for each unit of product. Think of all the menu items you can create with ground beef crumbles or grilled chicken patties. Do you use a separate product each time you use one of these items in your menu? If so, you are causing extra work for yourself and your distributor.

ASK: How can the number of SKUs be reduced in an SNP?

FEEDBACK:

- Using the same product for more than one menu item, such as one type of chicken patty for chicken on a bun, chicken Parmesan, and grilled chicken salad
- Allowing only substitutions that have been approved by the school nutrition director or central office person responsible for purchasing
- Identifying multiple uses for an inventory item is cost-efficient for both the district and the vendor

SHOW SLIDE: Standardized Recipes

SAY: In an earlier lesson, we discussed the advantages of using standardized recipes in menu planning. We know that they provide information on ingredients, numbers of servings, and portion sizes. They identify the quantity to purchase, are beneficial in the forecasting process, and help control food and labor costs.

Objective: Recognize key information when forecasting menu items' usage.

SHOW SLIDE: *Forecasting*

SAY: Forecasting is the process of analyzing current and historical data to determine future trends. In SNPs, it involves predicting and estimating goods, products, and/or services needed in specified areas for the coming year, based on a review of current procurement activities. Forecasting helps procurement plans become more accurate each fiscal year.

SHOW SLIDE: *Forecasting – Critical to Program*

SAY: Adequate planning and forecasting ensures a competitive procurement process. The process is critical to the district's ability to obtain high quality products and services at the lowest possible cost.

ASK: What are some factors that contribute to the successful forecasting for procurement?

FEEDBACK:

- Utilizing cycle menus
- Screening the product
- Forecasting accurate quantity
- Writing clear specifications
- Allowing adequate solicitation lead time
- Controlling product inventory, movement, and cost management

SHOW SLIDE: *Forecasting Menus*

SAY: The use of cycle menus contributes to a more efficient procurement process.

ASK: How far in advance do you plan your menus?

FEEDBACK:

A good practice is to plan your menus one year in advance because it:

- Helps to determine accurate quantities for forecasting
- Saves time
- Helps avoid repetitive tasks
- Reduces labor
- Helps implement a cost effective inventory management process

SHOW SLIDE: Forecasting USDA Foods

SAY: Forecasting includes contemplating the use of USDA Foods. There are many different ways to use entitlement dollars in gaining high quality products. Check with your State agency on which processing programs are available to you.

SHOW SLIDE: Product Categories

SAY: The menu and standardized recipes will help to determine the type and grade of product to purchase. Products vary in grades and quality levels depending on categories. It is worthwhile to investigate all categories before making any decisions on which product to buy. Categories include Distributor's Choice Label, Private Label, and Manufacturer's Brand Label.

SHOW SLIDE: Distributor's Choice Label

SAY: Products in this category contain only one or a few ingredients. The supplier may quote a price on any brand, and the school district places no restrictions on the brands to be purchased. Examples of products you might buy as distributor's choice would be staples like salt or sugar, single ingredient products like pinto beans, or paper products. The supplier is not asked to identify the brand being quoted, and the site receiver does not check the brand delivered. Therefore, the distributor may change the brand without notifying the school district.

The only requirement is that the product is in the pack-size and case-size identified on the solicitation document. For example, a case of pinto beans containing 12 #303 cans cannot be substituted if the specification calls for 6 #10 cans; 25 lb of salt specified may not be substituted for 100 lb or 10 lb of bulk product; a 50 lb bag of sugar cannot be substituted with two 25 lb bags of sugar.

SHOW SLIDE: Private Label

SAY: Products in this category are packed under industry acceptable standards. The private label represents the supplier's brand. Many distributors have their own brand and prefer to sell it instead of brand name items. If you are buying a private label product, the supplier will choose the brand, but it still must conform to the specification. In many cases, it is worth the task of tasting these products. What type of product might you buy under a private label?

SHOW SLIDE: As Purchased (AP) and Edible Portion (EP)

SAY: Many factors contribute to calculating the amount of food needed to purchase to equal the amount of food needed for a recipe or service. As Purchased (AP) and Edible Portion (EP) are key concepts to understand in inventory management.

- As Purchased (AP) refers to the weight of the product as it exists when purchased (e.g., fresh whole turkeys have skin and bones).
- Edible Portion (EP) refers to the part of the product that can be consumed.

Using EP conversion information is very important in determining the total amount of a product needed.

SHOW SLIDE: Manufacturer's Brand Label

SAY: Products in this category are recognized by name and generally attract customers who are brand loyal. Manufacturer's brand products are usually breakfast and lunch main entrees, contain multiple ingredients, and are processed. These are the menu drivers that meet your customer's expectation level. Your objective is to have the brand name product available each time it is on the menu. It is also what propels your average daily participation and keeps customers returning. Perhaps your favorite chicken nugget or frozen pizza are manufacturer's brand products you would buy. Manufacturer's products are subject to tremendous variation in quality among brands. As food becomes more complex and processed due to the increased use of processed products, more effort has to be devoted to quality control. When purchasing brand name products, the specifications must be clear that suppliers may bid on brand name "or approved equal" products. Specifying only one product does not ensure maximum full and open competition, and schools cannot limit competition to a single manufacturer's product.

SHOW SLIDE: Average Daily Participation (ADP)

SAY: The average daily participation (ADP) is used to determine staffing needs, purchase food and supplies, and schedule food production. In addition to ADP, school nutrition directors must also consider student preferences and popularity of menu items. Accurate forecasting provides critical and valuable information. This information benefits both the school district and potential distributors who are considering bidding on the items in the solicitation document.

SHOW SLIDE: Velocity Report

SAY: A velocity report provides the quantity, date of purchase, and other valuable information about each item received. The report can serve as a tool for the SFA staff when forecasting the needs of the district, and it documents bid integrity. Upon request, the distributor can generate this report for products purchased during a specific time period. Many distributors have online ordering systems that allow the school nutrition director to review a velocity report at any time. With the ease in which products are now electronically tracked, distributors can quickly review what they have sold against what was stated as a quantity. After one year's history, it is easy to see if the quantities were accurately calculated estimates. If quantities previously listed have not been closely met, distributors will know that quantities are inaccurate. Distributors may increase prices significantly to make up for previous losses.

SHOW SLIDE: Past, Present, and Future

SAY: Establishing accurate forecasts requires reflection on the past, consideration of present conditions, and speculation as to the future. Some considerations include student preferences; revenue from the previous year; the current inventory; the upcoming year's menu; the likely cost of labor, goods, products, or services in the coming year (season); and the number and ages of the students being served throughout the school year. A comparison of actual purchases to the last solicitation document is also helpful.

SHOW SLIDE: Activity: Forecasting—Past, Present, and Future**ACTIVITY: Forecasting—Past, Present, and Future****Materials:** Forecasting—Past, Present, and Future worksheet**Time:** 10 minutes

Instructions: Divide the participants into teams of 4–5 members. Assign one of the following topics: “The Past,” “The Present,” and “The Future.” Ask each team to identify what questions they would need to ask to acquire the information needed to accurately forecast menu items for the upcoming school year for their particular topic. Encourage participants to write their responses on chart paper. Allow 5 minutes to complete the activity. Allow each group 1–2 minutes to report at the end of the activity. Then refer participants to the Participant’s Workbook in which they will find the **Forecasting—Past, Present, and Future** worksheet. Ask them to add any questions which came up in the discussions to the list in the Participant's Workbook.

SAY: Divide into teams of 4–5 members. Identify what questions you would need to ask to acquire the information needed to accurately forecast menu items for the upcoming school year for your particular topic. Please write your responses on chart paper.

DO: Divide participants into teams of 4–5 members. Give each team a sheet of chart paper.

Forecasting—Past, Present, and Future

Instructions: Identify what questions you would need to ask to acquire the information needed to accurately forecast menu items for the upcoming school year for their particular topic. Add any questions which came up in the discussions.

The Past

- Has the Average Daily Participation (ADP) for the serving of this item been increasing, decreasing, or remaining the same?
- What are the revenues from the past year?
- _____
- _____

The Present

- In what meal service is the item menued?
- For what grade levels is the item menued?
- Is the price of this item cost effective in the program, including the impact to utility and waste removal costs?
- How often does the item appear on the menu?
- Is the menuing of this item contingent on the availability of USDA Foods?
- What is the current inventory?
- Is there sufficient storage space including space for recyclables?
- _____
- _____

The Future

- What is the upcoming year's menu?
- Will this item still be menued to the same customers and in the same frequency as it is currently?
- Is the product still going to be available in the manufacturer's portfolio?
- Are there any changes in menu or meal requirements that no longer allow this item to be served in the same manner as it has been?
- Will this force this item to be menued to different grade levels?
- Can you still afford to offer this item?

- Do you need to divert or order USDA Foods to produce this item?
- What is the estimated dollar value of your procurements for the upcoming year?
- _____
- _____

Objective: Discuss product descriptions and create a mock product description.

SHOW SLIDE: *Writing Product Descriptions*

SAY: Depending on the product, writing specifications can be difficult and time consuming. In some cases, the descriptions may need to be long and detailed; while in others, the specification can be limited to only those characteristics that are essential for communicating with the supplier, such as the Standard of Identity (SOI), quality grade, and size. Most single-ingredient foods, such as fresh produce or graded meats, often only need a brief specification. Developing specifications for multi-ingredient, processed food products is more involved.

Selecting a new product may require research on a brand name, industry standards for manufacturing, or quality indicators for the product. It also might be necessary to obtain samples and taste test the product before adding it to a bid. It is important to develop specifications that are not overly restrictive to competition. For example, specifying only a “brand name” product instead of allowing “an approved equal” product to be offered restricts full and open competition. If you need some sample product descriptions, there are many sources. Including several USDA websites, State agencies, cooperative buying groups, and peer SFAs.

SHOW SLIDE: *Product Specification Resources*

SAY: In your Participant's Workbook there is a list of websites that provide sample specifications. This resource can be helpful when you look at your product specifications before your next procurement process.

- Meats/Meat Alternates from Institutional Meat Products Specifications (IMPS)
www.ams.usda.gov/grades-standards/imps

This website covers guidance and specifications for many meats/meat alternates:

- 200 Fresh Lamb and Mutton (PDF)
- 300 Fresh Veal and Calf (PDF)
- 400 Fresh Pork (PDF)
- 500 Cured, Cured and Smoked, Cooked Pork Products (PDF)
- 600 Cured, Dried and Smoked Beef Products (PDF)
- 700 Variety Meats and Edible By-Products (PDF)

- 800 Sausage Products (PDF)
- 11 Fresh Goat (PDF)
- Commercial Products Commercial Item Descriptions
www.ams.usda.gov/grades-standards/cids

This website provides information on many commercial ingredients, single and combination products. The link to the page on prepared, combination food and specialty preparations contains pdf files for items such as:

- Macaroni and Cheese, Frozen
- Chicken Chow Mein, Frozen
- Peppers, Stuffed with Beef and Rice, in Sauce, Frozen
- Breakfast Pizza, Prepared, Frozen
- Burrito, Prepared, Frozen
- Pizza, Prepared, Frozen
- Lasagna, Vegetable, Frozen
- Macaroni and Beef in Tomato Sauce, Frozen
- Grades and Standards
www.ams.usda.gov/grades-standards

This website provides grading and standard information on:

 - Beef, Dairy, Eggs, Fish and Seafood
 - Fruits, Goat, Lamb, Nuts, Organic Products
 - Pork, Poultry, Rabbit
 - Specialty Products like Bok Choy, Horseradish, Honey, etc.

STANDARDS OF IDENTITY

SAY: Some products have Standards of Identify (SOIs), which are Federal requirements that define what a food product is, its name, and the ingredients that must or may be used in the manufacture of that food. SOIs protect consumers by ensuring labels accurately describe the products contained within the package. For example, an imitation spread cannot be called mayonnaise, and a non-dairy frozen dessert cannot be called ice cream. In the United States, SOIs are issued by the USDA, the Food Drug Administration, and the Bureau of Alcohol, Tobacco, Firearms, and Explosives. If a product has a standard of identity, you can use that product name in your product description.

SHOW SLIDE: Product Description

SAY: To sell you a product, your vendor should provide a clear description of the product, portion size, manufacturer's name, code number, and pack size. If you want to order a brand name product, you must indicate that you will accept a preapproved equal. For example, if a fish product is listed, the type of fish would need to be identified (e.g., tilapia), the cut of fish (e.g., filet), and the portion size, the precooked weight, and whether it is frozen, etc. In addition to the previously mentioned information, when specifying a brand, include the manufacturer's:

- Name
- Name for the Product (e.g., rounds, triangles, and dips)
- Code Number
- Pack Size

Pull out the **Key Information to Include in Product Description Specifications** handout and follow along as we discuss each of these product description components.

Key Information to Include in Product Description Specifications

Name of the Product

Developing specifications for multi-ingredient, processed food products is more involved. Selecting a new product may require research on a brand name, industry standards for manufacturing, or quality indicators for the product. It might also be necessary to obtain samples and taste test the product before adding it to a solicitation document.

Description of the Product

A vendor will need a description of the product. The product description must clearly indicate that respondents may quote on brand name or preapproved equal products to ensure maximum free full and open competition. For example, if a fish product is listed, the type of fish would need to be identified (e.g., tilapia), the cut of fish (e.g., filet), and the portion size, the precooked weight, and whether it is frozen, etc. In addition to the previously mentioned information, when specifying a brand, include the manufacturer's:

- Name
- Name for the Product (e.g., rounds, triangles, and dips)
- Code Number
- Pack Size
- Case Pack and Weight

How should the item be packaged, and how big are the cases? This can be as simple as six #10 cans, or four 5 lb loaves, or not to exceed 25 lb. Some other example descriptions may include individually wrapped, 48 to the case, 72 to the case, or 96 to the case. Cases cannot exceed 30 pounds.

- Minimum and Maximum Size and Pieces

What is the minimum size of the product? What is the maximum size of the product? A possible description may include, "each serving must weigh a minimum of 3.9 ounces and cannot exceed 4.1 ounces."

- Main Ingredient(s)

What are the main ingredients? Some possible descriptions may include pinto beans, black beans, or whole grain-rich tortilla.

- Other Product Ingredients

What other ingredients can be included in the product? Some possible descriptions may include whole grain pasta, whole wheat flour, or product may include spices, emulsifiers, vegetable purees, and thickening agents.

- Prohibited Ingredients

What ingredients are prohibited? When creating a specification, indicate what ingredients are prohibited in the product [e.g., food additives, artificial colors and flavors, hydrogenated fat, Monosodium glutamate (MSG), and assorted allergens]. USDA follows FDA standards, and some states may have more stringent requirements. If there is ever a question about the ingredients of an item, the SFA staff should refer to an official ingredient label. Some possible descriptions may include: product cannot contain pork, fish by-products, MSG, soy derivatives, or food coloring.

- Nutritional Standards

What are the nutritional standards for the product? Are there minimum or maximum nutrient or ingredient requirements or limitations? Some possible descriptions may include pinto beans and black beans combined must provide a 1.5 ounce equivalent for the Meats/Meat Alternates, and the whole grain-rich tortilla must provide a 1.5 ounce equivalent for the Grains component for the NSLP. Product must meet NSLP requirements.

- Meal Pattern Requirements/Child Nutrition (CN) Label

Does the product contain certain meal components? Does the product have a CN Label? The existence of a CN Label on a product provides School Food Authorities and other FNS meal program operators with a guarantee that the product contributes to the meal pattern requirements as printed on the label. If the product does not include a CN Label, it does not mean that it is not creditable. Check with your manufacturer for crediting specifics.

- Unit on Which Award Is Made

How will the SFA team determine which company is offering the best price for an acceptable product? How will the unit price be determined for an acceptable product? Some possible descriptions may include: by the case, by the serving size, or per pound.

- Quality Indicators

What are some quality indicators for a particular product? Some food items are very basic and are either defined by their single-ingredient, such as iodized salt, or by their SOI. Standards of identity for foods are Federal requirements that define what a food product is, its name, and the ingredients that must or may be used in the manufacture of that food. SOIs protect consumers by ensuring labels accurately describe the products contained within the package. For example, an imitation spread cannot be called mayonnaise, and a non-dairy frozen dessert cannot be called ice cream. In the United States, SOIs are issued by the USDA, the Food Drug Administration, and the Bureau of Alcohol, Tobacco, Firearms, and Explosives. The specifications for single-ingredient items and items with SOIs may simply be written with only their pack size as a qualifying characteristic. Many times brands are not listed on the specification for single-ingredient or SOI items.

SHOW SLIDE: Case, Pack, and Weight

SAY: How should the item be packaged, and how big are the cases? This information can be as simple as six #10 cans, or four 5 lb loaves, or not to exceed 25 pounds. Some other example descriptions may include individually wrapped, 48 to the case, 72 to the case, 96 to the case, cases cannot exceed 30 pounds.

SHOW SLIDE: Minimum and Maximum Size and Pieces

SAY: What is the minimum size of the product? What is the maximum size of the product? A possible description may include each serving must weigh a minimum of 3.9 ounces and cannot exceed 4.1 ounces. Another example is a serving of chicken nuggets should be 5 nuggets.

SHOW SLIDE: Main Ingredient(s)

SAY: What are the main ingredients? Some possible descriptions for an enchilada may include pinto beans, black beans, reduced fat cheese, and whole grain-rich tortilla.

SHOW SLIDE: Other Product Ingredients

SAY: What other ingredients can be included in the product? Some possible descriptions may include whole grain pasta, whole wheat flour, or product may include spices, emulsifiers, vegetable purees, and thickening agents.

SHOW SLIDE: Prohibited Ingredients

SAY: What ingredients are prohibited? When creating a specification, indicate what ingredients are prohibited in the product [e.g., food additives, artificial colors and flavors, hydrogenated fat, monosodium glutamate (MSG), and assorted allergens]. USDA follows FDA standards, and some states may have requirements that are more stringent. If there is ever a question about the ingredients of an item, the SFA staff should refer to an official ingredient label. Some possible descriptions of prohibited items may include product cannot contain pork, fish by-products, MSG, soy derivatives, or food coloring.

SHOW SLIDE: Nutritional Standards

SAY: What are the nutritional standards for the product? Are there minimum or maximum nutrient or ingredient requirements or limitations? Some possible descriptions may include limits on sodium, calories, and fats.

SHOW SLIDE: Meal Pattern Requirements/CN Labels

SAY: Do you want the product to contain certain meal components? For example, you may specify pinto beans and black beans combined must provide a 1.5 ounce equivalent for the Meats/ Meat Alternates, and the whole grain-rich tortilla must provide a 1.5 equivalent for the Grains component for the NSLP. Does the product have a CN Label? The existence of a CN label on a product provides School Food Authorities and other FNS meal program operators with a guarantee that the product contributes to the meal pattern requirements as printed on the label. However, they aren't always necessary.

SHOW SLIDE: Unit Award Is Made

SAY: The product description should also indicate how the district will make the decision on which company is offering the best price for an acceptable product? How will the unit price be determined for an acceptable product? Some possible descriptions may include by the case, by the serving size, or per pound.

SHOW SLIDE: Quality Indicators

SAY: What are some quality indicators for a particular product? Some food items are very basic and are either defined by their single-ingredient, such as iodized salt, or by their standard of identity. The specifications for single-ingredient items and items with SOIs may simply be written with only their pack size as a qualifying characteristic. Many times, brands are not listed on the specification for single-ingredient or SOI items.

SHOW SLIDE: Activity: Bean Burrito Product Description**ACTIVITY: Bean Burrito Product Description**

Materials: Key Information to Include in Product Description Specifications handout and Bean Burrito Product Description activity template

Time: 15 minutes

Instructions: Refer participants to the **Key Information to Include in Product Description Specifications** handout and the **Bean Burrito Product Description** activity template. Divide participants into small groups. Assign one description topic to each of the groups. Allow 5 minutes for the group to write a description for the assigned topic. Allow 1 minute for each group to report their description. If time is short, have them go to the answer page for the **Bean Burrito Product Description** and determine if there is additional information that should be added to the sample.

SAY: Turn to the **Bean Burrito Product Description** activity template in the Participant's Workbook. As a group, let's develop a product description for a bean burrito. As we discuss the possibilities, write notes on the **Bean Burrito Product Description** activity template.

DO: At the conclusion of the activity, refer participants to the Participant's Workbook for the **Bean Burrito Product Description Example**. Remind participants this is only an example, and other product descriptions may better meet the needs of their district.

Bean Burrito Product Description Example

Name of Product: Bean Burrito

Description of the Product: Two-bean burrito on a whole grain-rich tortilla

Case Pack/Weight: 72 to the case; paper between layer; bulk case cannot exceed 22 pounds in total weight

Minimum and Maximum Size and Pieces: 3.9 ounces and cannot exceed 4.1 ounces

Main Ingredient(s): Pinto beans, black beans, and an individual whole grain-rich tortilla

Other Product Ingredients: Product may include spices, emulsifiers, vegetable purees, and thickening agents

Prohibited Ingredients: Product cannot contain dairy, beef, chicken, pork, fish by-products, *trans* fats, or monosodium glutamate (MSG)

Nutritional Standards: Pinto beans and black beans combined must provide a 1 ounce equivalent for the Meats/Meat Alternates, and the whole grain-rich tortilla must provide a 1 ounce equivalent for the Grains component for the National School Lunch Program; product must be 10% or fewer calories from fat and may not exceed 400 mg sodium

Unit on Which Award is Made: Based on unit price for acceptable products

Quality Indicators: Private label or manufacturer's brands are subject to internal quality screening; golden brown color; ability to hold in warming cabinet for up to one hour

Grade Standards: Not Applicable

Meal Pattern Requirements/Child Nutrition (CN) Label: CN Label preferred or product must meet 1 ounce equivalent for the Meats/Meat Alternates, and the whole grain-rich tortilla must provide a 1 ounce equivalent for the Grains component for the National School Lunch Program

Objective: Identify various types of acceptable purchasing methods, including Federal procurement regulations, policies, and procedures governing all SNP purchases.

SHOW SLIDE: *Bid Integrity*

SAY: The integrity of a bid is strengthened and trust is built when time is spent developing good forecasts. Distributors can be confident that the items specified on the bid in the quantities listed are accurate to the best of the district's ability. With this knowledge, the distributor is willing to provide their most competitive pricing.

Adequate forecasting is critical not only between district and distributor, but further along the supply chain to the manufacturer of the product. A manufacturer or distributor does not want to maintain too much inventory for fear the inventory will expire before the district can utilize the quantities on hand.

SHOW SLIDE: Full and Open Competition

SAY: We have discussed how to determine how much of which products we want to buy. Now we are going to talk about the procedures that need to be used to be in compliance with Federal, State, and local rules. Earlier we talked about the importance of trust among the partners in procurement. Full and open competition means that all suppliers are playing on a level playing field and have the same opportunity to compete. Procurement procedures may never unduly restrict or eliminate competition. Competition is important to secure the best price for the best quality product or service.

SHOW SLIDE: Competitive Procurement

SAY: All procurements, regardless of dollar value, must be competitive unless requirements to conduct a noncompetitive requirement are met. Procurement using your account must follow the Federal, State, and local procurement regulations and school nutrition policies. There are several different ways to properly procure goods and services. When the State agency conducts a review of your procurement actions, the first thing they will review is your district's procurement plan. Your procurement plan will explain how the SFA will decide if the procurement will be informal solicited (i.e., micro purchase, small purchases) or formal solicited (i.e., Invitation for Bid or Request for Proposal) solicited. It will include the code of conduct which will describe the ethical standards. It will outline how disputes will be decided. The State agency will also review your purchases to determine if the SFA included requirements which would have discouraged competition. These types of requirements are called overly restrictive.

SHOW SLIDE: Requirements That Decrease Competition

SAY: Examples of requirements that restrict competition for procuring food products include:

- Placing unreasonable requirements on distributors (e.g., must have at least two drivers at all times when delivering the food or requiring daily deliveries)
- Requiring a high number of years in business in order for them to qualify to do business (must have 10 years of experience)
- Having organizational conflicts of interest (e.g., vendor is son of school nutrition director, vendor has a business relationship with someone on the school board)
- Having unnecessary bonding requirements (requiring a bond of 100%)
- Specifying only a brand name product instead of allowing a preapproved equal product to be offered (e.g., will only accept XYZ broccoli spears)

SHOW SLIDE: Methods of Procurement

SAY: Office of Management and Budget's (OMB) regulation 2 CFR 200 defines appropriate procurement processes, including:

- Two informal methods—micro purchases and small purchases
- Two formal methods—Invitation for Bid and Requests for Proposals
- Non-competitive procurement—there are strict rules on when this is allowed

Let's look at each of these methods in more detail.

SHOW SLIDE: Micro Purchases

SAY: The micro purchases method is new and was developed by OMB to make smaller purchases easier to do. Micro purchases allow State agencies or SFAs to purchase without competitive quotations if the:

- Aggregate value of purchase does not exceed \$50,000
- Buyer considers the price to be reasonable
- Micro purchases are distributed equitably among qualified suppliers
- Purchases are documented

In addition, micro purchases:

- Allow SFAs to react quickly to changing markets and urgent needs
- Make procurement easier for small SFAs
- May allow for more purchases of local products

SAY: When the State agency conducts the procurement review, they will ask to see a sample of your micro purchases and will determine if it complies with the requirements on this slide.

SHOW SLIDE: Small Purchases

SAY: Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or property when the value of that purchase falls below the small purchase threshold. The Federal small purchase threshold is currently set at \$250,000. State and local regulations often set lower small purchase thresholds that are more restrictive than the Federal level.

SFAs are required to follow the most restrictive small purchase threshold. Do you know what the small purchase threshold is in your area? If not, you need to find out. Even if the value of the procurement falls below the applicable small purchase threshold, the SFA can opt to use either the small purchase method or a formal procurement method.

When the State agency conducts the procurement review they will ask to see a sample of your small purchases and determine if these purchases comply with the requirements on this slide.

SHOW SLIDE: Small Purchases – Good Practices

SAY: Once the written informal solicitation document has been developed, the next step is to contact the sources of supply. What constitutes an adequate number of sources?

Clearly, the lower the anticipated dollar value of the procurement, the less critical the answer will be, but a minimum of two sources should always be contacted. It is a good practice to obtain in writing three sources that are eligible, able, and willing to provide the product, goods, and/or services. The law prohibits breaking up bids to smaller units (to keeping individual purchases under the small purchase threshold) to avoid the formal procurement process.

SHOW SLIDE: Invitation for Bid (IFB)

SAY: An Invitation for Bid (IFB) is used in formal procurements. An IFB is a type of solicitation document used in competitive sealed bidding. An IFB is used when there is no substantive difference among the products or services that meet specifications and the key difference among responsive bids is price. What kinds of products would you buy using an IFB? You use an IFB when you know exactly what you want to buy—for example a case of canned green beans with a private label.

SHOW SLIDE: Request for Proposal (RFP)

SAY: A Request for Proposal (RFP) is also a type of competitive procuring method. Request for Proposal is a technical proposal that explains how the prospective vendor will meet the objectives of the solicitation document. RFPs include a cost element that identifies the costs to accomplish the technical proposal. Similar to the IFB, the RFP is publicized and is used to solicit proposals from a number of sources. What types of things would you solicit with a RFP? If you know all of the services you need, you can leave it up to the company responding to this solicitation to tell you what they think you need to produce the result that you want.

The RFP identifies the goods, products, and/or services needed and all significant evaluation factors. When you use a RFP you tell the prospective vendors the result you want to accomplish and you tell them how you will evaluate their proposals. A good practice is to develop an evaluation criteria with measurable outcomes in the solicitation. While price alone is not the sole basis for award, price remains the primary consideration when awarding a contract under the competitive proposal method. The contract award for the RFP is granted on lowest price after an evaluation of both technical and cost factors, and after potential negotiation. What that means is that when you develop your evaluation criteria, the highest number of points needs to be awarded based on price.

SHOW SLIDE: Two Elements in RFPs

SAY: The response to a competitive proposal solicitation (RFP) consists of two distinct elements: the technical proposal, in which the respondent explains how the task will be accomplished, and the cost proposal, in which a respondent provides the costs for accomplishing its technical proposal. Since the SFA staff does not know precisely how the task can best be performed, the technical proposals are as important to the purchaser as the cost proposals. The RFP will ask respondents to identify how they will accomplish the requested services. The cost part of the proposal is opened after the SFA is satisfied that the technical proposal has responded to the SFA's specifications and requirements for the goods, products, and/or services being sought, and any other conditions that respondents must meet in order to be considered responsive and responsible.

SHOW SLIDE: Activity: Competitive Procurement**ACTIVITY: Competitive Procurement**

Materials: Competitive Procurement handout

Time: 10 minutes

Instructions: Have participants review the **Competitive Procurement** handout in the Participant's Workbook.

SAY: Review the **Competitive Procurement** handout in the Participant's Workbook.

Competitive Procurement

Informal Procurement

Micro Purchases and Small Purchases

Require competition and must be free of anticompetitive prices

Contracts cannot be awarded on the basis of a cost plus percentage of cost or a cost plus percentage of interest (7 CFR Part 3016 and Part 3019)

- Micro Purchases
 - Require the SFA to determine potential vendors and distribute business equitably
- Small Purchases
 - Will almost always lead to the SFA receiving fewer solicitations than with a formal procurement process

Formal Procurement

Invitation for Bid (IFB) and Request for Proposal (RFP)

More rigorous and prescriptive than small purchases methods

- Involves more time and effort to develop and publicize the solicitation and to evaluate and award the contract
- Involves drafting a solicitation document that is far more detailed and complex than what is used in a small purchase

Take many more steps to ensure the intent to procure a good or service was widely and publicly solicited among prospective respondents

Require competition and must be free of anticompetitive practices

Contracts cannot be awarded on the basis of a cost plus percentage of cost or a cost plus percentage of interest (7 CFR Part 3016 and Part 3019).

IFB

Complete specifications or descriptions of the product or service are available or could easily be developed by the SFA

Responsive bids differ along no dimension other than price

More than one qualified/responsible source is thought to be willing and able to compete for the award

RFP

At a minimum, must:

- State the purchasing agency's need using clear and thorough specifications that are not overly restrictive
- Specify the anticipated terms and conditions of the contract
- Provide information that the respondent must include in their proposal as to how they will accomplish the services requested
- Identify each factor that the purchaser will use to evaluate the proposals and award the contract
- Describe how technical and cost factors will be considered in making the final determination of which respondent will receive the contract [i.e., The relative importance (or weight) of each factor in the award of the contract]
- Weight price higher than any other factor
- State that the award will be made, on the basis of price and other factors, to the responsive and responsible firm or individual whose response is most advantageous to the purchasing agency, after price and other factors have been considered.

Instructor's Note: *The SFA may receive general specification information to use in developing its IFB or RFP. This information can only be used for the purpose of developing a specification. The information received from a vendor cannot be used word for word in a solicitation. A person who develops drafts, specifications, requirements, statements of work, invitations for solicitations, requests for proposals, contract terms and conditions, or other documents used by the SFA in conducting the procurement may not compete for the procurement. The SFA must be careful not to lift the words of potential bidders, as doing so could potentially exclude the individuals from the bidding process.*

SHOW SLIDE: Noncompetitive Procurement

SAY: Procurement by noncompetitive proposals may be used only when:

- The award of a contract is infeasible under small purchase procedures, sealed solicitations, or competitive proposals, and one of the following circumstances applies to the situation.
- The item is available only from a single source. Food and Nutrition Service (FNS) requires that all sole source procurements be approved prior to award by the applicable State agency.
- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation. Lack of planning or doing a procurement at the last minute does not constitute an emergency.
- The awarding agency authorizes noncompetitive proposals. This is not something that would generally happen.
- After solicitation of a number of sources, competition is determined inadequate. This does happen sometimes and is important that the SFA document that it did its procurement activity correctly.

SHOW SLIDE: Contracts

SAY: So now that you have done your best to write good specification and you have followed all of the rules on soliciting your product and service you can rest—RIGHT? WRONG, the work is just beginning. First, you need to finalize your contract and then you have to make sure your vendors are fulfilling their part of the contract. What is the purpose of a contract? Some reasons for a written contract include:

- Serves as a legal and binding document
- Requires the parties to seriously consider the effects of their performance
- Records agreement
- Helps with disputes among parties

ASK: Do all procurements result in the same type of contract?

FEEDBACK:

No. For IFBs and RFPs procurement methods, an SFA must decide if their solicitation will result in a Fixed-price Contract (IFBs and RFPs) or a Cost-Reimbursable Contract (only RFP).

SHOW SLIDE: Fixed-Price Contract

SAY: Fixed fee or fixed-price means an agreed upon amount that is fixed at the inception of the contract. There are several types of fixed fee or price contracts. A firm fixed-price contract provides a stated price that is fixed without any upward or downward adjustment for the duration of the contract, including for all renewal periods. In some cases, a fixed-price contract may contain an economic price adjustment tied to an appropriate index. There are several sources of public and auditable economic adjustment factors. For agricultural products, the Agriculture Marketing Service provides market reports for various regions of the country, which you can check to see if the prices your vendors are charging are reasonable. Delivery costs are affected by gasoline and diesel prices. The energy department tracks fuel costs so you could check that web site to determine if charges are reasonable.

Instructor's Note: Website addresses as of March 3, 2020

- Agricultural prices: www.ams.usda.gov/market-news
- Gas and fuel prices: www.eia.gov/petroleum/gasdiesel

SHOW SLIDE: Benefits of a Fixed-Price Contract

SAY: A fixed-price contract provides a stated price that is fixed without any upward or downward adjustment for the duration of the contract, including all renewal periods. Since the prices are firm and do not change, the distributor assumes greater risk the longer this type of pricing is in effect, and the price will generally be higher than a pricing system based on changing prices. A fixed-price contract provides maximum incentives for a vendor to control costs and perform effectively and imposes the least administrative burden on the contracting parties. Competitive sealed solicitations (i.e., IFB) must result in a fixed-price contract.

SHOW SLIDE: Cost-Reimbursable Contract

SAY: A cost-reimbursable contract is a formal, legally enforceable contract that reimburses the contractor for costs incurred under the contract but does not provide for any other payment to the contractor, with or without a fixed fee. In a cost-reimbursable contract, allowable costs will be paid from the nonprofit school nutrition service account to the contractor net of all discounts, rebates, and other applicable credits accruing to or received by the contractor. For this to be possible, vendors and contractors must be able to provide sufficient information to permit the school food authority to identify allowable and unallowable costs and the amount of all discounts, rebates, and credits on invoices and bills presented for payment to the school food authority. Vendors and contractors should identify how this information will be provided in the contract.

Cost-reimbursable contracts are appropriate to use when costs cannot be estimated with enough accuracy to use fixed contract pricing. Cost-reimbursable contracts frequently occur in the SNP as cost-plus, fixed-fee contracts. Solicitations that result in a cost-reimbursable contract or contract that includes cost-reimbursable provisions must require the return of rebates, discounts, and other applicable credits.

SHOW SLIDE: Procurement Trivia Question

ASK: Why are cost plus a percentage of cost contracts not allowed?

DO: Allow the participants to respond.

FEEDBACK:

The percentage mark-up is added to the cost of the product which is not fixed but changes over the term of the contract. In this type of pricing structure, the contractor is rewarded for increased costs and therefore has no incentive to keep the prices low. SFA's contract with a contractor is fixed-price for the products for the entire term (12 months) of the contract with a fixed fee for delivery and service expressed as a percentage of the product. When the State agency conducts the procurement, review they will ask to see a sample of your formal procurement purchase solicitations, sample invoices, and they will be checking to see how well you manage your contracts.

Objective: Identify ethical behaviors.

SHOW SLIDE: Ethics

SAY: It is important all stakeholders in the school nutrition supply chain practice ethical behaviors. Ethics can be defined as the moral standards individuals use to guide decisions in their personal and professional lives. In the procurement world, ethical behaviors are practices that promote full and open competition. Professional standards of conduct include avoiding even the perception of unethical practices. School nutrition professionals have a responsibility to act ethically in accordance with all Federal, State, and local guidelines. It is an ethical obligation to procure the quantity of products that you have requested from a stakeholder. Accurate documentation is important to demonstrate compliance with the contractual terms and the district's policies.

Ethical violations in the workplace are a serious matter. For school nutrition professionals, unethical actions can be cause for termination and loss of funding for their program. Unethical practices can damage an employee's reputation and the reputation of the district. In some cases, ethical violations could even result in legal ramifications or prosecution and time in jail. Let's look at some scenarios.

SHOW SLIDE: Supplier Relations: Is This Ethical?

SAY: A vendor tells you there is a special on whole grain-rich dinner rolls. He states the rolls meet the USDA whole grain-rich criteria. The rolls will only be offered at a special price on Thursday. To receive the special price, you will need to attend a luncheon hosted by the vendor and purchase the rolls during this time.

DO: Allow the participants to respond.

SAY: This is not an ethical practice. It is appropriate to develop professional, collegial relationships with your distributors. The key is establishing and understanding the parameters of the relationship with present or potential suppliers. Attending supplier-hosted lunches, dinners, or business organization meetings is acceptable as long as there is no obligation to do business with the host supplier as a result of attendance. While an occasional business lunch may be appropriate, holding business meetings with suppliers in social settings outside the office can create the impression of impropriety. Such behaviors may provide sufficient justification for potential distributors to seek an administrative bid hearing.

SHOW SLIDE: Unacceptable and Illegal Practices

SAY: Some unacceptable and illegal practices include:

- Showing preference to suppliers because of pressure from management
- Allowing personality to enter into purchasing decisions
- Giving preference to suppliers based on long-term business relationships
- Giving preference to suppliers based on political connections
- Allowing anyone who is involved in manufacturing or selling the product to help you with writing the bid specifications or bid provisions

SHOW SLIDE: Gifts and Gratuities

SAY: A gift is anything of monetary value, including food, meals, travel, or entertainment. Some districts have very specific policies pertaining to accepting gifts and gratuities. If there is a doubt, then do not accept the gift.

SHOW SLIDE: Gifts and Gratuities: Is This Ethical?

SAY: A vendor has learned of your engagement and sends you a new housewarming gift. You take it home, and it looks beautiful on your fireplace mantle. How did he know exactly what to buy? You can't wait to thank him the next time you place an order.

DO: Allow the participants to respond.

SAY: This is not an ethical practice. Food distributors will often present gifts or gratuities as a way to earn your business or as a reward for being a loyal customer. A gift is anything of monetary value, including food, meals, travel, or entertainment, such as tickets to shows or sporting events. As innocent as a gift may appear, the solicitation or acceptance of gifts for personal gain may be considered unethical. Refer to the school district's gift acceptance and gratuity policy for procedures specific to your district. In general, if there is a doubt regarding the ethics of accepting a gift, then do not accept it.

SHOW SLIDE: Monetary Dealings

SAY: Soliciting or accepting money, loans, credits, prejudicial discounts, or services from vendors or potential vendors is an unethical practice. Remember, never lend money to or borrow money from suppliers!

SHOW SLIDE: Monetary Dealings: Is This Ethical?

SAY: Your son calls and says he will need a new track uniform and money to purchase a \$200 pair of tennis shoes. You tell him the shoes are not in the budget. A vendor over hears the conversation and offers you a loan. You accept the offer and plan to pay him back in the near future.

DO: Allow the participants to respond.

SAY: This is not an ethical practice. Soliciting or accepting money, loans, credits, prejudicial discounts, or services from your present or potential suppliers can also be unethical because it might influence or appear to influence your purchasing decisions. Never lend money to or borrow money from suppliers.

SHOW SLIDE: Legitimate Discounts, Rebates, or Credits

SAY: Sometimes a legitimate discount, rebate, or credit will be provided for a specific product. A discount, credit or rebate cannot offset expenses and act as a purchasing incentive. Discounts rebates and credits need to be taken directly off the invoice which can serve as your documentation.

SHOW SLIDE: Legitimate Discounts, Rebates, or Credits: Is This Ethical?

SAY: A vendor indicates the product you purchased is eligible for a manufacturer's rebate. When you review your invoice, you do not see the rebate. After contacting the vendor, you discover he totally forgot to process the rebate, and the offer is no longer available. He states he will give you free product valued at the dollar amount of the rebate.

DO: Allow the participants to respond.

SAY: This is not an ethical practice. A rebate helps offset expenses and acts as a purchasing incentive. When you do receive legitimate discounts, rebates, or credits from a distributor, they need to be taken directly off the invoice which can serve as your documentation.

SHOW SLIDE: Conflicts of Interest

SAY: Sometimes circumstances may arise that create a personal or professional conflict of interest. A conflict of interest is any action that allows a person to benefit at the expense of the public interest or the expense of their employer. This occurs when the individual involved in the decision-making process or someone close to this individual benefits by being awarded the contract. In this situation, any individuals involved in the conflict should excuse themselves from the selection process.

These are some examples of what may be perceived as a conflict of interest for individuals in the decision making process.

- The company bidding on a contract with your school district is owned by your personal friend, relative, or school board member.
- You own stock in the company.
- Your friend or relative is an employee at the company in a position where they would profit from gaining the contract.

SHOW SLIDE: Confidentiality

SAY: Providing confidential information of any kind to any person or entity that was not designated to be privy to that information is considered unethical. For example, before contracts are awarded, distributors submit sealed bids. The cost and pricing information in these bids may not be made public until after a decision has been made to award the contract. For example, it is unethical and illegal to ask one company to develop bid specifications for items when they are intending to submit a bid. This information could give that company an unfair advantage in drafting its proposal.

Objective: Recognize general inventory management practices.

SHOW SLIDE: Inventory Management

SAY: Inventory is the value of food and supplies on hand, whether at the food preparation site or in a central warehouse facility. Inventory management has long been considered a critical component of a well-managed SNP. Funds tied up in inventory are funds not available for other purposes, therefore it is essential that inventory is managed well. More recently, food safety and security issues have been added to the list of tasks involved in inventory management. The need for traceability or the ability for schools to track food products back to their source and track forward to the consumption or disposal of the product helps keep meals safe.

SHOW SLIDE: Traceability

SAY: Traceability or the ability to track food items back to their original source may be a new concept for employees in SNPs. It encompasses:

- Recording delivery dates
- Delivery agent information
- Quantity
- Product codes and lot numbers for items received by the school
- Disposition of the product such as served date or disposed of date
- At a minimum, best practices

SHOW SLIDE: Key Steps

SAY: Effective inventory management is essential for managing and controlling cost. This includes effective receiving procedures, a system for accounting for items removed from inventory, effective counting of items in stock, and determining appropriate methods for calculating the financial value of the inventory.

ASK: What are several important elements of effective inventory management?

FEEDBACK:

Some possible answers include:

- Knowing your food needs
- Knowing where and how much food you have on hand
- Controlling waste, loss, and theft
- Maintaining only as much as you need

SHOW SLIDE: *Activity: Inventory Management Best Practices*

ACTIVITY: Inventory Management Best Practices

Materials: chart paper

Time: 15 minutes

Instructions: Ask participants to write one inventory management practice that they have implemented in their district on a self-adhesive note. Facilitate the activity. Allow 1 minute to write down one inventory management practice and 4 minutes to place the idea on chart paper. Allow an additional 10 minutes for discussion.

Instructor's Note: *Place chart paper on the wall for participants to place self-adhesive note.*

SAY: Think about one inventory management practice that you have implemented in your district. Write your inventory management practice on a self-adhesive note and place it on the chart paper I have placed on the wall.

SHOW SLIDE: *Food Buying Guide and Calculator*

SAY: You should be familiar with the Food Buying Guide for Child Nutrition Programs. This guide has all of the current information in one manual to help you buy the right type and amount of food and determine the specific contribution each food makes toward the meal pattern requirements. It can be printed or referenced at this address (www.fns.usda.gov/tn/resources/foodbuyingguide.html)

The online interactive Food Buying Guide Calculator for Child Nutrition Programs has individual calculators for each of the meal pattern components. The calculator can also produce a shopping list for you for specific menu items. This is a tool you can use to help you forecast quantities for the purchases we have been talking about in this lesson.

ASK: So far, we have talked about why inventory control is important, AP and EP, best practices, and the Food Buying Guide. What else does inventory management include?

FEEDBACK:

Possible responses include:

- Storage area organization
- Controlling waste
- Theft and fraud prevention

SHOW SLIDE: *Storage Area Organization*

SAY: It is important that storage areas hold goods under proper conditions to maintain quality and safety. Temperature, humidity, air flow, the location of cleaning supplies—all of these are important to proper storage conditions.

SHOW SLIDE: *Spoilage and Waste*

SAY: As part of the State agency's Administrative Review, be prepared to show complete, accurate, and legible temperature logs.

SHOW SLIDE: *Controlling Waste*

SAY: Controlling waste has become a priority for many school districts.

ASK: What are some ways to control waste?

FEEDBACK:

Responses should include:

- Ordering only food needed for menu production
- Storing food properly
- Completing production records
- Controlling portions
- Controlling spoilage
- Planning to utilize leftovers
- Monitoring food temperatures
- Preventing theft
- Surveying students to determine preference
- Presenting food in an appealing manner
- Having coolers and freezers connected to an alarm system

SHOW SLIDE: Theft and Fraud Prevention

SAY: It is important to implement procedures to prevent customer, employee, and vendor theft and fraud.

ASK: What measures do you take to prevent theft or fraud in your operation?

DO: Allow participants to provide a few responses.

FEEDBACK:

Ensure the following are included:

- Limiting the number of keys
- Placing surveillance cameras in the dining area
- Not allowing employees to take home leftovers. Allowing employees to take home leftovers is unacceptable and is not an option in the SNP

SHOW SLIDE: Factors Affecting Inventory Management

SAY: Effective inventory control begins long before products are purchased. Effective menu planning and recipe development are the first steps in inventory management. Menu planning and recipe development should utilize a minimum of products while at the same time provide enough variety to maximize customer satisfaction and good nutrition. Procuring, forecasting, ordering, and receiving ensure that the right foods in the correct quantities arrive just-in-time for production. Storage practices keep food secure and minimize waste. Effective and efficient production and service practices ensure that customers consistently receive the foods they want that are freshly prepared and served in correct portions.

ASK: What can increase food costs?

FEEDBACK:

Responses should include:

- Out of stocks
- Substitutions
- Product reformulation
- Unclear specifications
- Inaccurate forecasting on bids
- Under-ordering
- Insufficient lead time for orders

ASK: What happens to inventory when a change in menus occurs?

FEEDBACK:

Responses should include:

- Partnership with distributor begins to dissolve
- Inventory is left on the shelf at the distributor
- Distributor out of stocks increase because orders are not predictable
- Students may be disappointed because they do not receive expected products – this leads to food leftover
- Accounting may have to request special permission from school board for products purchased that were not on the bid

SHOW SLIDE: *Inventory Just-in-Time (JIT)*

SAY: Knowing when food items are needed can help you develop a “just-in-time” inventory. Erratic orders add to the cost of doing business. When products are delivered once a week or more often, it is called Just-in-Time (JIT) delivery. Advantages include reduced inventory, reduced costs, and reduced paperwork.

It is important to manage food orders properly to minimize waste while also keeping storage capacity in mind. Inventory is perishable and space is limited, making proper product management even more crucial. More frequent deliveries will be reflected in higher bid price of a product but this should be outweighed by not having too much inventory on hand.

SHOW SLIDE: *Par Stock*

SAY: A par stock is established through a comparison of product use to the amount of time between deliveries. For example, if you have weekly deliveries and know you use three cases of fresh, sliced onions a week, you would always want three cases of onions in inventory each week.

Knowing your par stock levels are essential to a “just-in-time” inventory. Maintaining a stable number of cases ordered is not nearly as important as ensuring the school nutrition team is ordering the correct amount. The best way to facilitate this is a properly formatted order sheet that includes an accurate par stock. For high-use items with a long shelf life it is sometimes beneficial to keep an extra case on hand. The quantity to keep on hand would be reflected in the par stock number.

SHOW SLIDE: *First-In, First-Out (FIFO)*

SAY: The First-In, First-Out (FIFO) rotation system is the process of rotating the older product to the front and the newer items to the back of the shelf. Note that the age of the item is based on the manufacturer's pack date and not the date on the receipt. FIFO limits the amount of time food stays in storage. Food spoilage due to improper temperature control is another factor that raises the school nutrition service cost for the district.

SHOW SLIDE: Warehouse

SAY: Sometimes a school district owns or leases warehouse space. Warehouse operations increase the cost of managing inventory. Before making a decision about purchases, a school district must determine the cost of operating a warehouse and weigh this against the savings of being able to order in bulk and store extra inventory.

SHOW SLIDE: Assess Current Inventories and Orders on Hand

SAY: Knowing the amount of inventory and orders on hand is not always as easy as it sounds. Inventory may be scattered throughout the schools or in a number of district-owned warehouses. An up-to-date inventory tracking system is essential for the busy school nutrition director in knowing what is on hand in inventory. Clearly, having automated systems in place to assist in forecasting the district's needs will make this task much easier.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

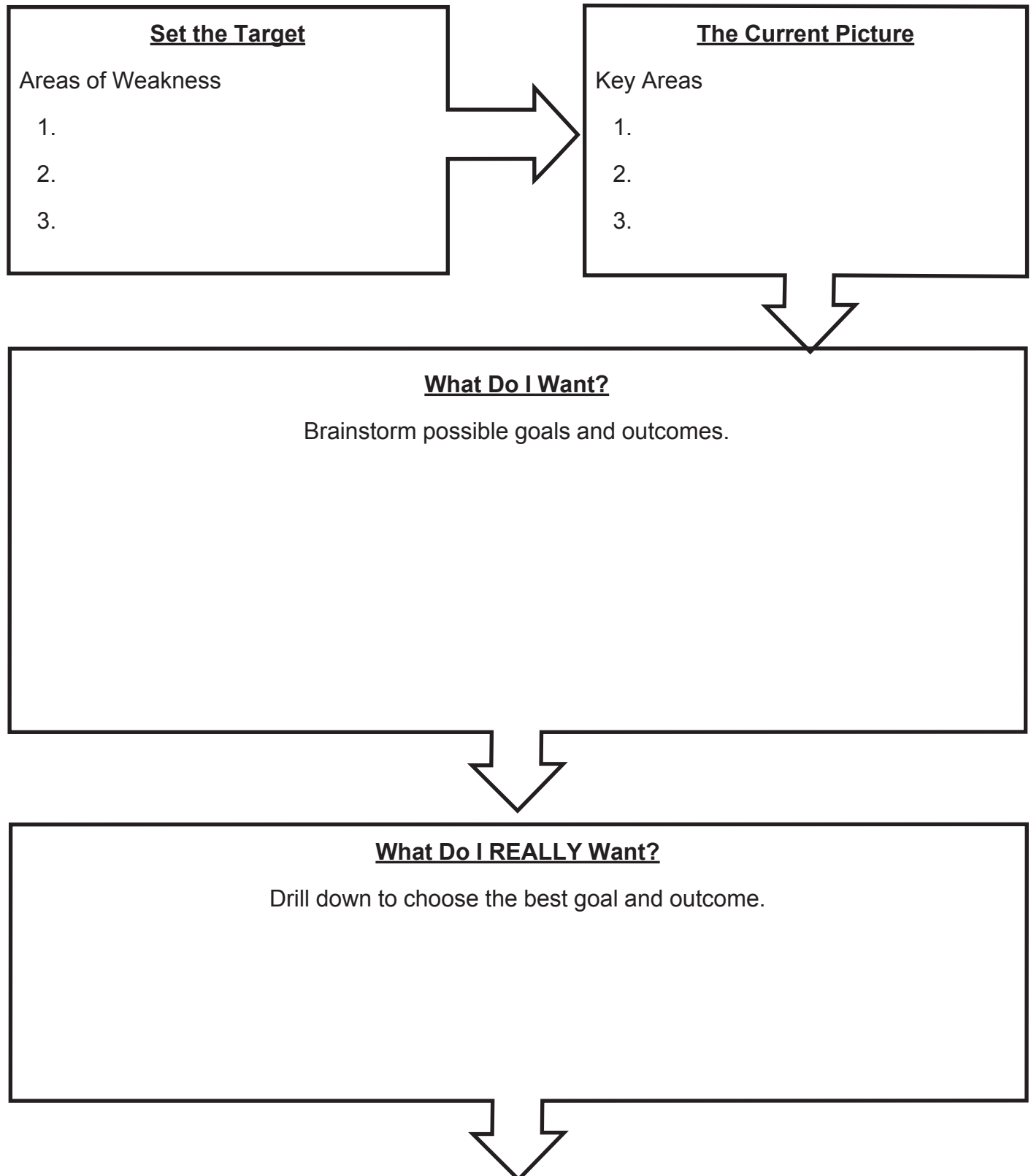
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Procurement and Inventory Management. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Procurement and Inventory Management** worksheet.

SMART Goals for Procurement and Inventory Management



Make sure it meets each characteristic.

252 Institute of Child Nutrition

Human Resource Management for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 ½ hours



Key Area: 3 (Administration)

USDA Professional Standards Code: 3400

2024

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Role of the School Nutrition Director

The most important decisions that school nutrition directors make are those that determine who is included on the school nutrition team. Success in school nutrition relies on frontline personnel more than any other person or group. Having the right people on the team in the right position is the greatest factor in the success of the school nutrition program (SNP). Despite the fact that we live in an age of technology, success lies in the hands of the school nutrition employees. Ultimately, employees are the reason that customers and students choose to participate in the SNP. To foster development of an effective SNP, the director must demonstrate and implement three fundamentals of excellence and best practices:

- **Leadership:** The school nutrition director serves as the trusted resource and advisor on child nutrition programs for the schools and community. The director must act in an ethical manner and must be a good steward of program resources at all times.
- **Collaboration:** The school nutrition director must work in partnership with a variety of people in the school community and in the larger environment.
- **Training and Professional Development:** School nutrition directors have the responsibility of continuous learning for themselves and their staff. They should engage in continuing education and participate in professional organizations to expand their knowledge. Directors must assess employee skills and needs and use the results to develop and implement personal development plans and training programs. Training and professional development is a continuous and never-ending process.

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Identify basic functions of human resource management.
- List local, State, and Federal regulations and policies relating to human resource personnel management.
- Describe what goes into a good job description.
- Establish and use job performance standards for school nutrition personnel.
- Describe how to help school nutrition program personnel become self-directed and self-managed staff to achieve program objectives.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify basic functions of human resource management.			
45 minutes	<ul style="list-style-type: none"> • Lesson objectives • Recruitment • Interview • Orientation • Sources of Information • Human Resource Guidelines • Grievance Policy • Discipline • Employee Theft • Harassment 	<ul style="list-style-type: none"> • Review Objectives • Recruiting New Employees • Qualities and Characteristics for New • New Employee Orientation Checklist • What I Got Versus What I Wanted • Human Resource Guidelines • Progressive Discipline Matching • Draw a Flower • Employee Theft 	<ul style="list-style-type: none"> • Participant's Workbook • Chart paper • Sticky notes • Index cards
Objective: List local, State, and Federal regulations and policies relating to human resource personnel management.			
15 minutes	<ul style="list-style-type: none"> • Federal Human Resource Regulation • Fair Labor Standards Acts • Family and Medical Leave Act 		Participant's Workbook
Objective: Describe what goes into a good job description.			
10 minutes	Job Descriptions	Job Description	Participant's Workbook
Objective: Establish and use job performance standards for school nutrition personnel.			
10 minutes	<ul style="list-style-type: none"> • Performance Appraisal • Numeric Performance Measures • Verbal Performance Measure 	Suggestions for Effective Performance Appraisals	Participant's Workbook

Time Allowed	Topic	Activity	Materials
Objective: Describe how to help school nutrition program personnel become self-directed and self-managed staff to achieve program objectives.			
10 minutes	<ul style="list-style-type: none"> • Motivating Employees • Employee Involvement • Conclusion – SMART Goals 	How Can We Involve Our Employees?	<ul style="list-style-type: none"> • Participant's Workbook • Note Cards
Total: 1 ½ hours			

Human Resource Management

SHOW SLIDE: Human Resource Management

SAY: Welcome to Human Resource Management. One of the most important decisions that school nutrition directors will make is who they bring on the school nutrition team. The success of the SNP and the director comes from the frontline personnel more than from any other person or group in the school nutrition department. Leaders are rewarded and held responsible for the actions of their staff. Thus, having the right people on the team in the right position becomes the greatest single factor in the success of the director and the program. People are more important than the menu, the equipment, or the facility. The success you have in building your team will determine the success of your program.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

Objective: Identify basic functions of human resource management.

SHOW SLIDE: School Nutrition Director's Decision

ASK: What do you think is the most important decision that a school nutrition director makes?

DO: Allow several participants to respond.

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: Recruitment

SAY: You can have a great school nutrition menu, but if employees are not talented or skilled in food preparation, the final products will not be acceptable. You can have talented staff, but if they are not motivated, they will not perform at an excellent level. The increasing demands placed upon SNPs make it essential to attract, build, and retain motivated, capable teams. Recruitment is the first step in meeting that need. The human resource department may be responsible for recruiting employees, but today we will assume that the SNP has the primary responsibility for recruiting employees.

ASK: Who is responsible for recruiting or has some involvement in recruiting employees for the school nutrition department in your district? Raise your hand if you are the one responsible.

Instructor's Note: *Allow one or two participants to tell how recruiting is done in their district.*

ASK: What are some ways to recruit employees?

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: Activity: Recruiting New Employees**ACTIVITY: Recruiting New Employees**

Materials: Recruiting New Employees handout

Time: 5 minutes

Instructions: Give participants 2 minutes to review the **Recruiting New Employees** handout. After participants have reviewed the handout, allow participants to give feedback for additional answers.

SAY: Review the **Recruiting New Employees** handout for the next 2 minutes. While you are reviewing the handout think about other ways that you might recruit new employees.

DO: After participants have reviewed the handout, allow for additional ideas for recruiting employees.

Recruiting New Employees

- Hand out business cards to outstanding people you meet (for example, a great server at a restaurant).
- Advertise on websites, including your own.
- Advertise openings on your school menus.
- Participate in job fairs.
- Word-of-mouth from current employees.
- Work with community organizations to advertise job openings.
- Implement an online application process so that interested persons can apply 24/7 at their convenience.
- Recruit permanent employees from the pool of substitute employees.

SAY: As we can see, there are a number of excellent ways to recruit new employees. Most school nutrition directors use a variety of advertising channels to seek prospective employees.

ASK: When creating an advertisement for employment, what information should you include in the advertisement?

SHOW SLIDE: *Information for Advertisements*

FEEDBACK:

Generally accepted criteria include the following information:

- Job title
- Job description (1–2 lines)
- Pay rate
- Hours of work per day
- Desirable characteristics and experience (i.e., bilingual preferred; cooking experience preferred)
- Benefits information (if benefits are provided or offered)
- Contact information

ICN's Applied Research Division has a great resource for competencies, knowledge, and skills for managers and directors that also includes templates for job descriptions.

SHOW SLIDE: *Activity: Qualities and Characteristics for New Employees*

ACTIVITY: Qualities and Characteristics for New Employees

Materials: chart paper

Time: 5 minutes

Instructions: Instruct participants to list the qualities and characteristics that you would desire in a potential employee. What dream advertisement would you create to recruit the best candidate for a school nutrition manager position?

SAY: Recruitment advertising should target the specific desirable characteristics required of SNP employees. Work with your team to list the qualities and characteristics that you would desire in a potential employee. What dream advertisement would you create to recruit the best candidate for a school nutrition manager position? Write it on a sheet of chart paper. Take 5 minutes for this activity.

DO: At the end of the 5 minutes, invite a person from each team to share their group's answers with the entire class and tape the chart paper to the wall so everyone can see the answers

SAY: As we review the lists and advertisements, do you see any similarities among teams? Are there characteristics that are more important than others are when you are recruiting for team members?

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: **Screening Employees**

SAY: Screening applicants before having a face-to-face interview is important in selecting the right applicant. Having an evaluation form/rubric of requirements based on score will help you identify qualified applicants. When using an evaluation form/rubric to score participants you cannot add any extra points for items not listed on the evaluation form/rubric. For example, if the job requires a high school education additional points cannot be given for a bachelor's degree.

SHOW SLIDE: **Interview**

SAY: The selection of "the right person for the right job" relies on the interview process. An effective interview can provide the information needed to determine if the applicant should be hired. Confidentiality should be maintained throughout the interview/hiring process. Before the interview, create a set of objectives related to the position and then create interview questions based on the interview objectives.

SHOW SLIDE: **Interview Objectives: Technical Skills**

SAY: The first objective of an interview focuses on the technical aspects of the job. Does the applicant have the knowledge and skills to do the job, or can they learn them? Some programs administer a test to job applicants. The test must be fair, objective, and administered equally to all applicants. Board and district policies will define the testing process and procedures.

SHOW SLIDE: **Interview Objectives: Interaction with Employees**

SAY: The second objective is more difficult to determine, yet is as important as the first. For example, the most gifted and talented baker is a poor fit for the organization if they cannot get along well with others or is not friendly to customers.

SHOW SLIDE: **Interview Objectives: Work History and Job Performance**

SAY: The third objective addresses work history and performance. Other desirable characteristics might include education, professional experience, notably high performance levels or achievements in other jobs, and any certifications applicable to school nutrition. Generally, the best predictor of future performance and behavior is past performance and behavior.

SHOW SLIDE: **Suggested Peer Interview Team Members**

SAY: A technique that is gaining increased acceptance in human resource management is the peer group interview. For example, if interviewing for a school nutrition manager position at an elementary school, the interview team might include the following: the elementary school principal, a teacher from that school, the school nurse, the school nutrition director, a school nutrition supervisor, and a member of the school nutrition staff at that school. Each team member is charged with asking two or three questions. A standard list of questions to ask each applicant fosters objectivity. An example of a question might be, "Tell us about your experience working with children." One of the key benefits to this interview technique is that

everyone involved becomes a stakeholder and takes ownership in the decision. This provides a built-in incentive to ensure that the school nutrition manager is successful.

SHOW SLIDE: Orientation

SAY: Recently hired employees, especially those new to commercial/institutional foodservice, often find a school kitchen overwhelming. The orientation process introduces newly hired employees to school nutrition in a friendly, supportive, and positive manner.

Orientation usually takes place in three phases.

1. District orientation
2. Departmental orientation
3. Specific job orientation

District orientation is conducted by district human resources personnel while departmental and specific job orientation is performed by school nutrition personnel. All new employees should participate in orientations.

SHOW SLIDE: Suggestions for Effective Orientation

SAY: Let's review some suggestions for an effective orientation program. These include:

- Allowing enough time to adequately cover content
- Assigning new employees a mentor so they have a colleague with whom to talk and share experiences
- Conducting orientation in a place with no distractions

SHOW SLIDE: Activity: New Employee Orientation Checklist

ACTIVITY: New Employee Orientation Checklist

Materials: New Employee Orientation Checklist handout

Time: 5 minutes

Instructions: The **New Employee Orientation Checklist** handout is in the Participant's Workbook. This list offers suggestions for topics and activities that could be included in new employee departmental orientation. This list is not comprehensive. Ask participants to share with the class other topics or activities they think would be important to include.

SAY: Let's look at the **New Employee Orientation Checklist** handout in the Participant's Workbook. This list offers suggestions for topics and activities that could be included in new employee departmental orientation. This list is not comprehensive. Take 2–3 minutes to review, then I will ask you to share with the class other topics or activities you think would be important to include. Add these ideas to the checklist in the spaces provided.

New Employee Orientation Checklist

Materials

- ☐ Employee handbook, both facility and department
- ☐ Department newsletters, menus, other related publications
- ☐ Other relevant handout materials

Topics

- ☐ Facility/department mission and philosophy
- ☐ General rules and regulations (i.e., sexual harassment policy)
- ☐ Probationary/permanent employment periods
- ☐ Identification policies
- ☐ Parking location/policies
- ☐ Safety/security issues
- ☐ Promotion opportunities/career ladder
- ☐ Hours of work
- ☐ Attendance policy
- ☐ Overtime policy
- ☐ Dress code
- ☐ Grievance procedures
- ☐ Union-related information, if applicable
- ☐ Required training/certifications (health department food safety certification, Civil Rights)
- ☐ Activities
- ☐ Tour of facility
- ☐ Introduction to department director, manager, and others

SAY: Once the orientation process concludes, the new employee is ready to report to work at the school kitchen and receive specific job orientation. In many districts, a manager conducts this portion of the orientation. The manager may pair a more experienced employee with the newly hired worker to familiarize them with the facility and work procedures. At the conclusion of orientation, it is nice to provide the new employee with a token, such as a certificate, pin, or uniform, in recognition of becoming a member of the school nutrition team. Effective school nutrition directors ensure that new employees receive a positive impression of the school nutrition department so that they are motivated to become dependable, high-performing team members.

ASK: Does employee training end with the conclusion of orientation?

FEEDBACK:

No! Prospective, new, and current directors are challenged to view training as an ongoing process. To meet the ever-increasing demands of the workplace, directors must invest in their employees. The best way to do so is through training. Training occurs when information is provided to school nutrition employees. Continuous reinforcement is an important element in supporting training. Continuous training occurs when a topic that has already been addressed is reviewed or presented anew. Many training sessions feature a mixture of new content and previously covered content.

ASK: What types of training are available?

FEEDBACK:

Here are a few examples of the many ways to train employees.

- Classes during Professional Development Days
- On-the-Job (OTJ) training
- ICN's online and face-to-face trainings
- ICN's Managers Corners

SHOW SLIDE: *Reasons for Poor Performance*

SAY: Sometimes training with a different approach or in a different context can be helpful. Effective training programs provide employees with the skills and knowledge to perform their tasks competently, remove barriers to competent performance, and motivate employees to fulfill expected job performance. To determine training needs, the director should review and evaluate previous and current performance and anticipate future training needs. Employees must be able to demonstrate that they can perform the job. One way to gauge current performance and clarify training needs is to complete the following exercise, "What I Got Versus What I Wanted."

SHOW SLIDE: Activity: What I Got Versus What I Wanted**ACTIVITY: What I Got Versus What I Wanted****Materials:** What I Got Versus What I Wanted worksheet**Time:** 10 minutes

Instructions: Have participants complete this table by remembering times when they observed lower levels of performance than expected. In the first column, note the performance received, and in the second column, the desired performance. See the example. Work in groups and choose a reporter to present each group's answer(s).

SAY: Your assignment is to complete the cells in this table by remembering times when you observed lower levels of performance from employees than you expected. In the first column, note the performance you received. Complete the second column with the performance desired. See the example. Work in groups. The group will need a group reporter to present the group's answer(s).

DO: Allow 5 minutes to complete the activity. Let each group provide one example.

What I Got Versus What I Wanted

The performance I got	The performance I wanted
Example: <i>Burned pizza</i>	<i>Correctly cooked pizza</i>

SAY: Conducting the **What I Got Versus What I Wanted** activity is one way of identifying training needs. Historical records, safety and accident reports, facility requirements, new regulations, menu changes, and customer evaluations and comments are additional suggestions for identifying training needs. Your district also may mandate specific training topics. Training programs can be designed to address groups of employees who require specialized training. For example, staff need training that addresses their production responsibilities, and cashiers should receive training on the equipment they use and duties they are expected to perform. Although topics may differ, each training program must address specific objectives, implement methods to measure, and evaluate progress.

SHOW SLIDE: Manager Trainee Program

SAY: Many directors find that the increasing complexity of the school nutrition environment and foodservice industry, heightened public scrutiny, and increasingly scarce resources combine to highlight the need for a training program for future school nutrition managers. Today the use of computers, Federal and State mandated initiatives and programs, computer-controlled and programmable kitchen equipment, and the importance of food safety also point to the need for a school nutrition manager trainee program.

SHOW SLIDE: Monitoring

ASK: How does a school nutrition director monitor and review performance?

Instructor's Note: *There are no right or wrong responses.*

SAY: Methods of monitoring performance include personal observation and reports, audits, and data analysis. The key to effective monitoring is for the school nutrition director to know which performance criteria to use and how to measure them. A key concept of training is the need for feedback. One of the "Golden Rules" of human resource management is that "feedback is the breakfast of champions." Feedback is an excellent tool for motivating employees, and school nutrition directors should not let their employees work without feedback. Remember to "praise in public and correct in private." Top directors find multiple ways to give staff feedback about their jobs. One successful school nutrition director writes one letter a day thanking an employee for his or her performance. The thrill of receiving a letter from the director really motivates this director's staff to perform well!

Let's recap what we have discussed so far.

- Recruiting
- Interviewing
- Selecting, hiring
- Orienting
- Training
- Monitoring
- Reviewing

Human Resource Management is an enormous, complex topic and contains multiple elements.

SHOW SLIDE: Compliance

SAY: Aspiring school nutrition directors must manage human resources in compliance with all local, State, and Federal regulations and policies. Lack of compliance could prove to be costly to the school district or result in disciplinary action(s) against the director. The school nutrition director is responsible for ensuring compliance with these policies and procedures by all department employees. The four principles on the following slide offer guidance to directors for managing the program's human resources.

SHOW SLIDE: Human Resource Guidelines**ACTIVITY: Human Resource Guidelines****Materials:**

- Sticky notes
- **Human Resource Guidelines** handout

Time: 5 minutes

Instructions: Ask participants to write one example on a sticky note of how they would demonstrate each guideline in the workplace. Read each guideline while participants write their examples.

SAY: As we discuss the guidelines, write one example on a sticky note of how you would demonstrate each guideline in the workplace. The **Human Resource Guidelines** handout is in your Participant's Workbook if you would like to follow along.

Human Resource Guidelines

1. **Maintain constructive relationships.** Remember that school nutrition is a people-oriented business. The director's relationship with employees is critical to the success of the SNP. Positive relationships must be earned and based on respect, trust, and dignity.
2. **Focus on the situation, issue, or behavior, not the person.** When dealing with others in a professional capacity, the focus should be on the behavior or actions of the individual, not the person. For example, a director should not tell an employee that he or she is a bad person for being absent frequently. Instead, it is more productive to explore the reason for the absences and point out the detrimental effect the absences have on co-workers when they must repeatedly "take up the slack" for others.
3. **Maintain the self-confidence and self-esteem of others.** Treat others as you wish to be treated—with respect. Remember that everyone needs to maintain their personal dignity. Praise employees and others often when their behavior warrants it. Praise can be a powerful motivator for improved performance.
4. **Lead by example.** The school nutrition director must exhibit behavior others wish to emulate and model desired behaviors.

SAY: Ask yourself the following questions:

- Am I friendly, approachable, and positive?
- Do I build the self-confidence of others?
- Do I find examples of good performance and praise the performer?
- Do I share success with the school nutrition team?

ASK: Where can a school nutrition director learn about policies and procedures relating to the management of personnel?

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: Sources of Information

SAY: The best source of information is the district's human resource (HR) department. Thus, it is very important for school nutrition directors to build an effective partnership with the human resource office. Some school districts require the human resource department to conduct all HR functions. In other districts, some functions are conducted by the district HR department and specific designated functions are conducted within the SNP. Today, we will assume that your school nutrition department conducts many of its own HR functions with the district's HR office serving in an advisory capacity. Another source of information about your employer's HR policies and procedures is the school board policy manual. Each state has policies and procedures to which public and private school employees must adhere. Within the manual are the State, local, and district policies and procedures relating to HR management. Often, instructions for implementing these policies and procedures are included. Many school districts place the school board policy manual online for easy access by employees and the public. Many school nutrition directors share the regulations, policies, and procedures with employees through in-service education and departmental meetings.

SHOW SLIDE: Employee Grievance

SAY: One of the most often consulted sections of the school board policy manual is the section on employee grievances. An employee grievance process should include the following elements:

- District grievance policy
- Process for filing an employee grievance
- Procedure for district response to employee grievance
- Timelines for district response
- Consequences when time limits are unmet
- Other due dates and requirements
- Guidelines for administrators
- Sample forms
- Outline of the grievance process

SHOW SLIDE: Common Elements of Grievance Policy

SAY: There are two common elements of all grievance policies.

1. The district should attempt to resolve problems before the employee feels it necessary to file a formal grievance.
2. The grievance should be resolved at the lowest level possible.

The effective school nutrition director thoroughly addresses all employee concerns and complaints promptly. Problems do not go away; they just get bigger.

SHOW SLIDE: Progressive Discipline

SAY: Another key area that the school board policy manual may address is progressive discipline. Progressive discipline provides employees with an opportunity to correct behavioral deficiencies. The specific process may vary from district to district. As the name implies, progressive discipline seeks to apply correction in proportion to the severity of the offense and/or the frequency of the offense. For example, a district's policy may state:

- Being late to work one to three times in a four-week period will result in a verbal conference with written documentation of the conference
- Being late four to six times will result in a formal written correction
- Being late seven or more times will result in additional corrective actions, up to, and including, termination.

Some behaviors by employees, such as safety violations or offenses against students, may result in immediate termination. If the school nutrition department employees are unionized, there may be additional policies and procedures relating to employee discipline. Since there may be considerable "grey" areas regarding which actions/behaviors by employees will result in which corrective actions, the school nutrition director should request guidance from the human resource department and become thoroughly knowledgeable about school board and school district policies.

SHOW SLIDE: Activity: Progressive Discipline Matching**ACTIVITY: Progressive Discipline Matching**

Materials: Progressive Discipline Matching handout

Time: 5 minutes

Instructions: Have participants match the steps on the **Progressive Discipline Matching** worksheet to the correct definition.

SAY: Match the step on the **Progressive Discipline Matching** worksheet to the correct definition. Write the letter denoting the correct definition in the space to the left. However, keep in mind that each school board and district will have specific and individual policies and procedures for disciplinary actions. The school nutrition director must be familiar with the policies and procedures of the district and school board and ensure SNP compliance.

Progressive Discipline Matching

Definition	Step
<u> C </u> Verbal correction with no written documentation	A. Written correction
<u> E </u> Oral correction with written notes that the verbal correction took place but documentation is often informal	B. Termination
<u> A </u> Formal written record of the event and the corrective action that the employee must implement	C. Coaching session
<u> D </u> Formal written record of the event and the corrective action that the employee must implement. This is the final warning the employee will receive. Employee may be temporarily suspended as part of this process.	D. Final written warning
<u> B </u> Severing or ending the relationship between the employee and the employer. A written record of the termination decision is provided to the employee. Usually these proceedings are conducted by the HR department.	E. Verbal correction

SAY: The behavior displayed will guide the correction. For example, a dress code violation may call for a coaching session while a written correction may be appropriate if an employee neglects or avoids work. Termination may result from serious infractions, such as fighting, threatening to injure other employees, altering government records, attempting to work or drive under the influence of alcohol or other drugs, or mistreatment of a student. You must identify what your local policy specifies regarding job termination.

SHOW SLIDE: Good Disciplinary Practices

SAY: Employees must adhere to all regulations, policies, and procedures. The school nutrition director must ensure that all human resource actions adhere to the district's written policies and procedures. It is important to adhere to the following guidelines.

- Counsel the employee as soon as possible after the violation occurs.
- Contact union representative if required by contract.
- Hold the discussion in private and have another supervisor as witness.
- Speak to the employee in a calm, friendly, but firm manner.
- Document, document, document!

At all steps in the progressive disciplinary process, appropriate documentation is required. A rule of thumb is "if it was not documented, it never happened." Documentation serves as legal evidence and record of disciplinary actions. For example, without adequate documentation, a termination decision can be overturned.

SHOW SLIDE: Documentation Tips

SAY: Shown on the slide are some tips for ensuring that the documentation is thorough and complete:

- Write facts, not opinion
- Write who, what, where, when, and why
- Obtain written and signed statements from witnesses
- Document on the day the event occurred or as near to the day as possible
- Record time and date (day, month, and year)
- Take photographs as needed
- Give the accused a chance to explain verbally and in writing
- Obtain all sides of the story and remember to remain objective

SHOW SLIDE: Activity: Draw a Flower**ACTIVITY: Draw a Flower**

Materials: Sticky notes

Time: 2 minutes

Instructions: Instruct participants to draw a large flower on a sticky note. Let them know that they can be creative. Instruct them to draw a large X through it. This is a visual reminder that personnel documentation is not creative writing. It is not subjective but should be objective facts.

SAY: Please draw a large flower on a sticky note. You can be creative. (Take a pause.) Now draw a large X through it. This is a visual reminder that personnel documentation is not creative writing. It is not subjective but should be objective facts.

SHOW SLIDE: Discrimination

SAY: Discrimination is another topic that should be addressed in the district's school board policy manual. Discrimination against employees is prohibited. The best way to prevent allegations of discrimination is to treat each person in the same situation in the same manner.

SHOW SLIDE: Activity: Employee Theft**ACTIVITY: Employee Theft**

Materials: Employee Theft Scenario

Time: 2 minutes

Instructions: Read the Employee theft scenario asking participants to offer suggestions at the end of the scenario.

SAY: Let's read the following Employee Theft Scenarios. Please offer your suggestions as to what the school nutrition director should do.

Instructor's Note: *You may ask for volunteers to read the scenario aloud.*

SHOW SLIDE: Employee Theft Scenario

SAY: The school district administration implemented a "zero tolerance" policy regarding employee theft. Any employee found with undocumented district property after leaving work is to be terminated. Within a few weeks, several employees were observed taking district property from the cafeteria without permission. Each employee was terminated. Later, the school nutrition manager was found leaving for the day with cafeteria food items in her pocket. What should the director do? What is the precedent for the decision?

DO: Allow time for discussion.

SAY: The school nutrition manager was terminated. Failure to hold the school nutrition manager to the same standard as other employees would have placed the director and the entire school district in jeopardy.

SHOW SLIDE: *Harassment*

SAY: Harassment is a form of discrimination that violates Title VII of the Civil Rights Act of 1964 as amended. The following legal definition can be found in the Participant's Workbook. The harasser can be anyone (client, co-worker, friend, student, or stranger). The victim does not have to be the one directly harassed but can be anyone who finds the behavior offensive and is affected by it. The harasser does not have to be aware that their behavior is offensive and could be unlawful. Harassment is behavior that:

- Is unwanted or unwelcome
- Is severe, pervasive, and/or repeated
- Has an adverse impact on the workplace
- Occurs when one person has more formal power than the other

The school nutrition director must immediately address an allegation of workplace harassment. If a director learns of a complaint second-hand (e.g., a school nutrition manager states that one of the school nutrition employees feels uncomfortable about the lewd jokes that a delivery driver tells), this complaint must be addressed immediately. Finally, the severity of the offense varies by the degree of harassment.

The best course of action for the school nutrition director when a complaint of harassment occurs is to contact the district human resource department. The personnel in this department should be experts in managing complaints of all types of harassment, can correctly, and adequately address the issues. Federal laws and regulations affect all employees in the United States. The school nutrition director must be knowledgeable of these laws and regulations and ensure compliance by the SNP.

Objective: List local, State, and Federal regulations and policies relating to human resource personnel management.

SHOW SLIDE: *Federal Human Resource Regulation*

SAY: The Fair Labor Standards Act (FLSA) establishes minimum wage, overtime pay, record keeping, and youth employment standards affecting employees in the private sector and in Federal, State, and local governments.

The Fair Labor Standards Act mandates overtime pay at a rate of no less than one and one-half times the regular rate of pay after 40 hours of work in a workweek. The Fair Labor Standards Act requires employers to pay overtime to eligible employees any time it is worked, whether or not the overtime was sanctioned.

Let's look at the Fair Labor Standard Act Case Study #1 on the slide. Fair Labor Standard Act case studies are included in the Participant's Workbook.

SHOW SLIDE: *Fair Labor Standards Act Case Study #1*

ASK: A school nutrition employee works 3 hours of overtime in a workweek without the required prior approval from management. Does the employee qualify for overtime pay? Why or why not?

DO: Ask participants who think overtime should be paid to stand. Let this group sit down and ask those who think the answer is “no” to stand. Allow this group to be seated. Note how many stood each time.

FEEDBACK:

The answer is **YES**. The Fair Labor Standards Act does not address overtime approval. It mandates that any employee who works in excess of 40 hours in a workweek must be paid at a rate of not less than one and one-half times the regular rate of pay.

SHOW SLIDE: Fair Labor Standards Act Case Study #2

ASK: A school nutrition director has ordered an employee not to work overtime. In defiance of the director, the employee works 15 hours overtime. Does the employee qualify for overtime pay?

DO: Ask participants who think overtime should be paid to stand. Let this group sit down and ask those who think the answer is “no” to stand. Allow this group to be seated. Note how many stood each time.

FEEDBACK:

The answer is **YES**. The Fair Labor Standards Act mandates that if the employee worked in excess of 40 hours during the workweek, he or she must receive overtime pay.

SHOW SLIDE: Fair Labor Standards Act Case Study #3

ASK: A school nutrition area supervisor asks one of the school nutrition managers to pick up a package of hamburger buns from a school that is on the way to her own school. Should the manager be paid for her time, and if “yes,” for what period should the manager be paid?

DO: Ask participants who think overtime should be paid to raise their hand. Allow discussion of answers.

FEEDBACK:

The manager should be paid from the moment she arrives at the first school’s kitchen to pick up the hamburger buns. This is when the manager’s workday began. Her travel time from the first school kitchen to her school kitchen must be paid also. As the director, you must adhere to district payment policies and procedures.

SHOW SLIDE: Fair Labor Standards Act Case Study #4

ASK: The school nutrition managers are asked to answer the phone, accept deliveries, take deposits from parents, and perform other general duties while on their half-hour paid lunch break. Can the managers be required to accept a delivery during their lunch break?

DO: Ask participants who think the manager is required to accept a delivery during their lunch break to raise their hand. Allow discussion of answers.

FEEDBACK:

The answer is *YES* because the lunch break is paid. The manager can be required to perform necessary work during the paid lunch break.

- The Fair Labor Standards Act addresses a number of additional work situations, including:
 - Off-the-clock work
 - Travel time
 - Calculating time worked
 - Breaks and lunch hours
 - Compensatory time
- Exempt employees do not fall under the Fair Labor Standards Act regarding overtime rates of pay. These positions are salaried and ineligible for overtime compensation. District human resource departments should be knowledgeable about the guidelines and criteria for determining exempt status. Under State law and the Fair Labor Standards Act, complying with the regulation(s) is the responsibility of the employer, not the employee. Failure to comply with the law in any of these areas can result in legal action and liabilities.

SHOW SLIDE: Family and Medical Leave Act (FMLA)

SAY: Family and Medical Leave Act (FMLA) requires that an equal position must be held and provided for employees when they return to work after FMLA leave. It gives the employee job security for 12 weeks for qualifying events. The legitimate reasons for granting leave to employees under FMLA are:

- The birth and care of a newborn child of the employee
- Placement with the employee of a child for adoption or foster care
- Care for an immediate family member (spouse, child, or parent) with a serious health condition
- Medical leave when the employee is unable to work because of a serious health condition
- Service in the armed forces, Reserves, or National Guard

Let's review a case study.

SHOW SLIDE: Family and Medical Leave Act (FMLA) Case Study

SAY: An employee has been on unpaid leave for 10 weeks to care for her husband with a serious illness. The employee is a head cook, works 8 hours per day, and makes \$12 per hour.

ASK: What is the school nutrition director's legal responsibility when this employee returns to work?

FEEDBACK:

The director must provide an equal job in terms of scheduled hours, title, and compensation for that employee upon return from FMLA leave. Businesses are required by law in all 50 states to pay for the medical treatment and lost wages of employees who suffer job-related injuries or illnesses. State workers' compensation statutes vary by state. The Federal Employment Compensation Act covers non-military, Federal employees or those workers employed in some significant aspect of interstate commerce. Employees have a right to monetary compensation for temporary or permanent disability suffered during working hours. The school nutrition director is responsible for communicating district and workers' compensation policies and procedures to all employees.

SAY: Most workers' compensation programs include the following general provisions. It is illegal to:

- Terminate an employee for filing a workers' compensation claim
- Terminate an employee for reporting an injury suffered in the workplace
- Refuse to hire an applicant because he or she filed a workers' compensation claim at a previous place of employment, or falsely claimed workers' compensation benefits

Another consideration is that contractual employment agreements are a common feature of today's workforce. In many states, school district employees have the right to an employment contract under which they gain certain rights. Unionized workforces have rights and protections gained through collective bargaining. The school nutrition director with a unionized workforce must learn the specifics of the union contract and the rights of the school nutrition department. In some states, school nutrition employees are considered "at will" employees, and may be legally terminated at any time for any reason. These employees still have the protections of due process and district human resource department policies and procedures. An excellent instrument for clarifying performance expectations is the job description. Many school nutrition departments use job descriptions as a recruiting strategy and place them online. School nutrition directors should review employee job descriptions annually, recommend revisions, and obtain school board and district administration approval.

SHOW SLIDE: Purposes of Job Descriptions

SAY: Job descriptions communicate performance expectations, the working conditions in which the employee will perform, and the responsibilities and duties of the job. They also serve as a basis for the performance appraisal. Effective job descriptions must be thorough, complete, and non-discriminatory.

Objective: Describe what goes into a good job description.

SHOW SLIDE: *Elements of Job Descriptions*

SAY: This slide lists the elements of job descriptions. Follow along as we discuss them. Effective job descriptions should contain the following elements:

- **Purpose**
 - What the employee does on a daily basis
- **Qualifications**
 - Education/certification
 - Special knowledge and skills
 - Minimum experience required
- **Responsibilities and duties**
 - Detailed statements about specific daily work assignments
 - Supervisory responsibilities
- **Equipment used**
- **Working conditions**
- **Safety statement**
 - For example: The employee is expected to perform all duties in a safe manner and observe all safety precautions.

Job descriptions should be reviewed annually and revised as needed and when duties change. The school nutrition director is responsible for the review and revision of job descriptions. In summary, job descriptions serve many purposes in SNPs. Many Federal, State, and local laws and policies regarding human resource management affect the SNP. The importance to the success of the SNP of complying with these regulations cannot be underestimated. The school nutrition director must maintain current knowledge and ensure compliance with all applicable regulation and policies by the SNP. Review the list of suggestions for conducting an effective performance appraisal in the Participant's Workbook.

SHOW SLIDE: *Activity: Job Description*

ACTIVITY: Job Description

Materials:

- **Job Description Template #1** handout
- **Job Description Template #2** handout

Time: 10 minutes

Instructions: Divide the class into two teams. Give each team one job description to review from the two job descriptions provided in the Participant's Workbook. Ask participant's to review the job descriptions and answer the questions provided.

SAY: Turn to the **Job Description Template #1** and **Job Description Template #2** handouts in the Participant's Workbook. Review the two job descriptions and answer the following questions:

- What are two positive things about each of the two job descriptions?
- What are two things you would add, delete, or change on each of the two job descriptions?

DO: Ask someone in each group to report its answers to the entire class.

JOB DESCRIPTION #1

MANAGER TRAINEE

Purpose

Oversee in a relief capacity for the regularly assigned manager, production and service of breakfast, lunch, and after school snacks for students, faculty, administrators, and visitors in accordance with district policies and guidelines while maintaining first-class standards for service, safety, and sanitation. Maintain accurate paper and computer-based production records.

Qualifications

- Education/Certification
 - High school diploma or GED
 - Completion of department Manager Trainee Program
 - Food Protection Manager Certification
- Special Knowledge/Skills
 - Computer skills in Microsoft Office, email and Internet applications; prior experience with foodservice software preferred
 - Ability to operate commercial foodservice equipment
 - Ability to perform simple math
 - Ability to work with others to effectively present information and respond to questions from employees and customers
 - Ability to effectively communicate in English, both written and verbally (bilingual ability preferred)
 - Must have personal vehicle and be willing to drive it for department purposes (mileage will be reimbursed)

Minimum Experience

- Two years of related foodservice management experience/training preferred
- One year of supervisory experience preferred

Responsibilities and Duties

- Order and receive all food and supplies for the assigned cafeteria
- Assure security of food and supply inventory
- Manage daily money deposits and other financial functions
- Manage cash handling procedures and monitor cashiers for adherence to standards
- Maintain accurate State agency records on a daily, monthly, and annual basis
- Exercise discretion and independent judgment in daily operation of assigned cafeteria
- Communicate district and department policies and procedures to staff
- Supervise and evaluate employee work performance, provide feedback to employees during performance evaluations, staff meetings, in-services, and coaching
- Address complaints and resolve problems
- Oversee implementation and maintenance of safety training and food sanitation program (HACCP)
- Develop and implement work schedules
- Oversee new employee training and provide guidance and direction as needed

- Complete new employee progress reports
- Maintain compliance with regulatory standards for foodservice as established by local health department and State agency
- Follow guidelines to ensure accurate use of department school nutrition software
- Ensure quality control standards are achieved daily
- Provide input to assist in planning the future development of the school nutrition department
- Complete Food Protection Program and become certified as school nutrition manager within time frame assigned; maintain certification as required
- Attend required manager and safety meetings
- Additional tasks as assigned by director/assistant director or supervisor of school nutrition

Equipment Used

Oven, dishwasher, walk-in freezer and cooler, reach-through refrigerator, large floor mixers, steam table, ice cream freezer, warmers, steamers, tilting skillet, slicer, food preparation and serving utensils, chopper, hot and cold holding equipment, cash register, POS, computer, fax machine, telephone

Working Conditions

- Environment
 - Frequent exposure to outside elements and danger when delivering items for catering events
 - Constant attention to detail
 - Occasional overtime may be required
 - Often required to work in humid, wet conditions
 - Exposed to fumes/airborne particles, toxic or caustic chemicals, extreme cold and heat, risk of electrical shock, risk involved with working with machinery with moving parts
 - High noise level
- Safety
 - Perform all duties in a safe and responsible manner
 - Observe all safety precautions.

The information in this job description complies with the Americans with Disabilities Act (ADA) and is not a complete list of the duties performed in this position. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

Approved by _____ Date _____

Reviewed by _____ Date _____

Source: ICN Archives

JOB DESCRIPTION #2

SCHOOL NUTRITION TECHNICIAN AND ASSISTANT

Job Title:	School Nutrition Technician and Assistant	Wage/Hour Status:	N/E
Reports to:	School Nutrition Manager	Pay Grade:	Level 1A
Department:	School Nutrition	Date Revised:	10/02

Purpose

Prepare and serve nutritious, well-balanced meals to students, faculty, and visitors while maintaining established sanitation and safety standards

Qualifications

- Education/Certification
 - Ability to read and write preferred
 - Ability to understand verbal instructions required
- Special Knowledge/Skills
 - Courteous towards customers, including students, staff, and visitors
 - Ability to work successfully with students, customers, co-workers, and supervisory staff
 - Ability to operate commercial foodservice equipment
 - Responsibilities and Duties:
 - Prepare and serve nutritious, well-balanced meals
 - Cashier using an approved point-of-sale system
 - Maintain established sanitation standards; duties may include dishwashing and sanitizing, general cleanup, and kitchen maintenance
 - Maintain safety standards, follow district safety guidelines and procedures, and report unsafe conditions to the school nutrition manager
 - Store supplies in storage areas and other inventory management duties
 - Remove garbage and trash as needed
 - Maintain food quality and customer service standards
 - Work as part of team of professional employees; exhibit positive attitude, good communication skills, contribute to a positive atmosphere and working environment, assist in the efficient operation of a large kitchen
 - Any other duties as directed by supervisors in the line of authority

Equipment Used

Ovens, slicers, grills, tilting skillets, institutional dish machine, serving equipment (steam tables, ice cream freezer), walk-in freezer and cooler, reach-through refrigerator, warmers, mixers, steamers, food preparation and serving utensils, cash registers, computers

Working Conditions

- Physical Demands
 - Very frequent standing and walking
 - Frequent use of hands and fingers to grasp and handle or manipulate food as needed for preparation
 - Lifting/moving 1–35 pounds alone
 - Mopping, sweeping, and cleaning shelves
 - Occasional lifting/moving up to 60 pounds with assistance
 - Sitting, reaching (often overhead) with hands and arms
 - Climbing ladder, balancing, stooping, kneeling, crouching, or crawling
- Vision
 - Color and peripheral
 - Depth perception
 - Ability to adjust focus
- Safety
 - Perform duties in safe and responsible manner.
 - Observe all safety precautions.

The information contained in this job description is for compliance with the Americans with Disabilities Act (ADA) and is not an exhaustive list of the duties performed in this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Approved _____

Date _____

Reviewed _____

Date _____

Source: *ICNs Competencies, Knowledge, and Skills of Effective School Nutrition Assistants/Technicians*

SAY: There were several things omitted from each job description.

- For Job Description #1:
 - Reporting information
 - Pay grade
 - Revision date
 - Wage/hour status
 - Supervisory responsibilities
 - Physical demands
- For Job Description #2:
 - Sections on environment
 - Experience

Objective: Establish and use job performance standards for school nutrition personnel.

SHOW SLIDE: **Performance Appraisal**

SAY: School nutrition directors need to objectively and accurately rate the performance of their employees. The best way to accomplish this is the performance appraisal. The standards used to judge performance must be compatible with department goals and based on job descriptions. Performance standards are written statements that describe how well a job should be done. Performance appraisal is a process that assesses, summarizes, and improves the work performance of employees.

SHOW SLIDE: **Activity: Suggestions for Effective Performance Appraisals**

ACTIVITY: Suggestions for Effective Performance Appraisals

Materials: **Suggestions for Effective Performance Appraisals** handout

Time: 5 minutes

Instructions: Have participants follow along as you review the **Suggestions for Effective Performance Appraisals** handout.

SAY: We will now review some suggestions for effective performance appraisals. The **Suggestions for Effective Performance Appraisals** handout is in the Participant's Workbook.

DO: Review the **Suggestions for Effective Performance Appraisals** handout.

Suggestions for Effective Performance Appraisals

- Acknowledge/praise and recognize/reinforce good performance
- Improve unsatisfactory performance
- Create a positive sense of team membership
- Be honest but sensitive
- Be consistent—use the same criteria from employee to employee
- No surprises—do not present anything that you have not discussed previously
- Be prepared
- Set a convenient time and place to meet. If you think it may not go well, schedule the meeting late in the day or after other employees have left work
- Allow no interruptions during the performance appraisal
- Discuss specific goals for improvement and schedule
- Offer encouragement for areas that need improvement
- Training and resources
- Maintain confidentiality
- Maintain respect for the other person—remember their dignity and self-worth
- If there is a language barrier, have someone who is fluent in the employee's first language; typically, this person should be an administrator or professional (for example, foodservice supervisor, assistant principal, teacher, counselor, etc.)
- Evaluate for professional growth; never use appraisal punitively
- End on a positive note

ASK: What do you think are the objectives of performance appraisals?

SHOW SLIDE: **Objectives of Performance Appraisals**

FEEDBACK:

The objectives of performance appraisals are to:

- Improve performance
- Maintain desired performance
- Collect information for decision-making
- Solicit feedback from employees
- Maximize the growth potential of the employee
- Communicate future expectations

SAY: In assessing and measuring employee performance, the school nutrition director must have standards against which to measure the performance. The first step to determining performance standards is to ask what type of performance and behavior is desired from employees. Let us look at some example of standards for customer service. Take a moment to read them.

SHOW SLIDE: **Sample Performance Standard #1**

SAY: The slide shows three standards for customer service:

- Delivers good customer service
- Delivers excellent customer service to all customers and guests at all times and under all conditions
- Delivers consistently superior customer service, including greeting and thanking all customers, demonstrating a positive service attitude by smiling and greeting customers by name, and displaying and serving only the highest quality foods

ASK: Which of these statements do you think is the best standard? Why?

Instructor's Note: *There are no right or wrong responses.*

SAY: Effective performance appraisal should have standards that clearly define expected performance. The evaluator must be able to measure the standard so that the rating is impartial and employees are provided with objective information about their performance.

SHOW SLIDE: Sample Performance Standard #2**SAY:** Take a moment to read these examples:

- Has a positive attitude
- Is a positive member of the school nutrition team
- Exhibits teamwork, a positive attitude, and good communication skills

ASK: Which of these statements is best to you? Which one seems to be the most measurable?**Instructor's Note:** *There are no right or wrong responses.*

SAY: Although standard #3 is somewhat more exact than the first two, none of the three are specific enough to be a fair appraisal tool. The ICN School Nutrition Manager Competency-Based Performance Appraisal for School Nutrition Assistants/Technicians is an appraisal using essential duties linked to each of the functional areas. This resource can be downloaded from the ICN website's Resource Center (<https://www.theicn.org/icn-resources-a-z/ckssnmanagers21>). Performance appraisals should be developed from job descriptions. Once standards have been determined, the next step is to determine the performance measure. The performance measure is the means used to rate how employee performance compares to the standards. The two most common methods of rating are numeric and verbal.

SHOW SLIDE: Numeric Performance Measure**SAY:** Performance can be rated on a numeric scale. For example, it may be rated on a scale of 1–5, as illustrated on the slide.

Numeric Performance Measures				
Unacceptable	Below Average	Average	Above Average	Commendable
1	2	3	4	5

Circle the appropriate number.

SHOW SLIDE: Verbal Performance Measure**SAY:** Performance can be rated on a verbal scale without numbers. For example, it may be rated as follows:

Verbal Performance Measure			
Unacceptable	Needs Improvement	Meets Expectations	Exceeds Expectations

Check the appropriate box.

ASK: Now, let us think about the actual performance appraisal meeting. What do you expect to gain from this meeting?

Instructor's Note: *There are no right or wrong responses.*

SAY: This has been a very brief discussion of performance appraisal. It is an important and extensive topic so you will need to make use of the excellent references listed. Both ICN and USDA offer many helpful resources on this topic. Ultimately, the goal for school nutrition directors is for employees to progress into self-directed and self-managed teams. Teams that reach this stage are characterized by superior performance, largely because of their own direction and internal leadership.

Objective: Describe how to help school nutrition program personnel become self-directed and self-managed staff to achieve program objectives.

SHOW SLIDE: *Motivating Employees*

ASK: What does being self-directed and self-managed mean to you?

Instructor's Note: *There are no right or wrong responses.*

SAY: Motivating employees requires applying individual creativity and leadership to discover as many ways as possible to involve employees, as we did in this exercise. The peer interview process referenced earlier is a unique method of involving employees in the selection and hiring process. There is no limit to the number of ways that staff can get involved—the more involvement, the better the motivation and performance.

ASK: How can we motivate employees?

DO: Allow participants to give some answers. Note there are some ideas on the slide.

FEEDBACK:

Some ideas for motivating employees consist of the following:

- Pay wages comparable to neighboring districts. Invest in your staff.
- Cross-train employees. One of the most effective motivators is creating and implementing a plan for cross training for all employees. Expanding skills can motivate employees, foster pride, and help create a more effective program.
- Sponsor Recognitions and Service Awards: Years of Service Dinner Banquet,
- Employee of the Month, Committee Participation, Perfect Health Department Scores, and/or 100% On-Time Assignments.
- Offer feedback on program operations. Share information on department activities and results.
- Encourage employees to submit their ideas in a suggestion box.
- Ask for personal goals; take inventory of passions that may be valuable to program's success.

SAY: One effective method of motivating employees is to involve them in SNP activities. The more involved the employees, the more committed they are to the outcome. To be successful and encourage the best performance, the director must find ways to involve employees.

ASK: So, how can directors involve employees?

Instructor's Note: *There are no right or wrong responses.*

SHOW SLIDE: **Activity: How Can We Involve Our Employees?**

ACTIVITY: How Can We Involve Our Employees?

Materials: note cards

Time: 5 minutes

Instructions: Have participant's work as a group and list three ways to involve employees on a note card.

SAY: Note the examples provided on the slide. Work as a group for 5 minutes to list three ways to involve employees. Write your three ways to involves employees down on a note card.

DO: Ask each group to share one example with the class.

How Can We Involve Our Employees?	
Topic/Subject	Method of Involvement
Example: <i>dress code</i>	Create a uniform advisory committee; charge them with developing recommendations for a new uniform design.
Example: <i>special events</i>	Allow employees to help decorate the school cafeteria for special events.

SAY: Let's look at some ways to involve employees in department progress.

- Employee committees: Committee members help the department make decisions: staff uniforms, dress code, menu advisory, and employee recognition.
- Contests: Increase participation, health department inspection scores, recipe creation, best new recipe.
- Product testing: Involve staff in training other employees: menu items, cleaning supplies, forms, policies and procedures, new programs and technologies, kitchen equipment, new concepts.
- Involvement in training: Give employees a chance to shine by recruiting them as instructors for training and in-service lessons.
- Delegation: Delegate specific tasks to employees and provide support and feedback for their efforts.
- Role play: We perform like we practice. Practice provides a number of advantages.

Motivating and retaining an outstanding team is a primary goal for school nutrition directors. It is important to recognize that one of the benefits of working together in our groups is the opportunity to network. Think of one topic that you would like to know more about and ask members of your group or others at the orientation where you might get additional information. As a reminder, who you hire is the most important decision you will make. Success ultimately comes from the employees so be sure to assemble a great team.

SHOW SLIDE: Conclusion

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers—how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

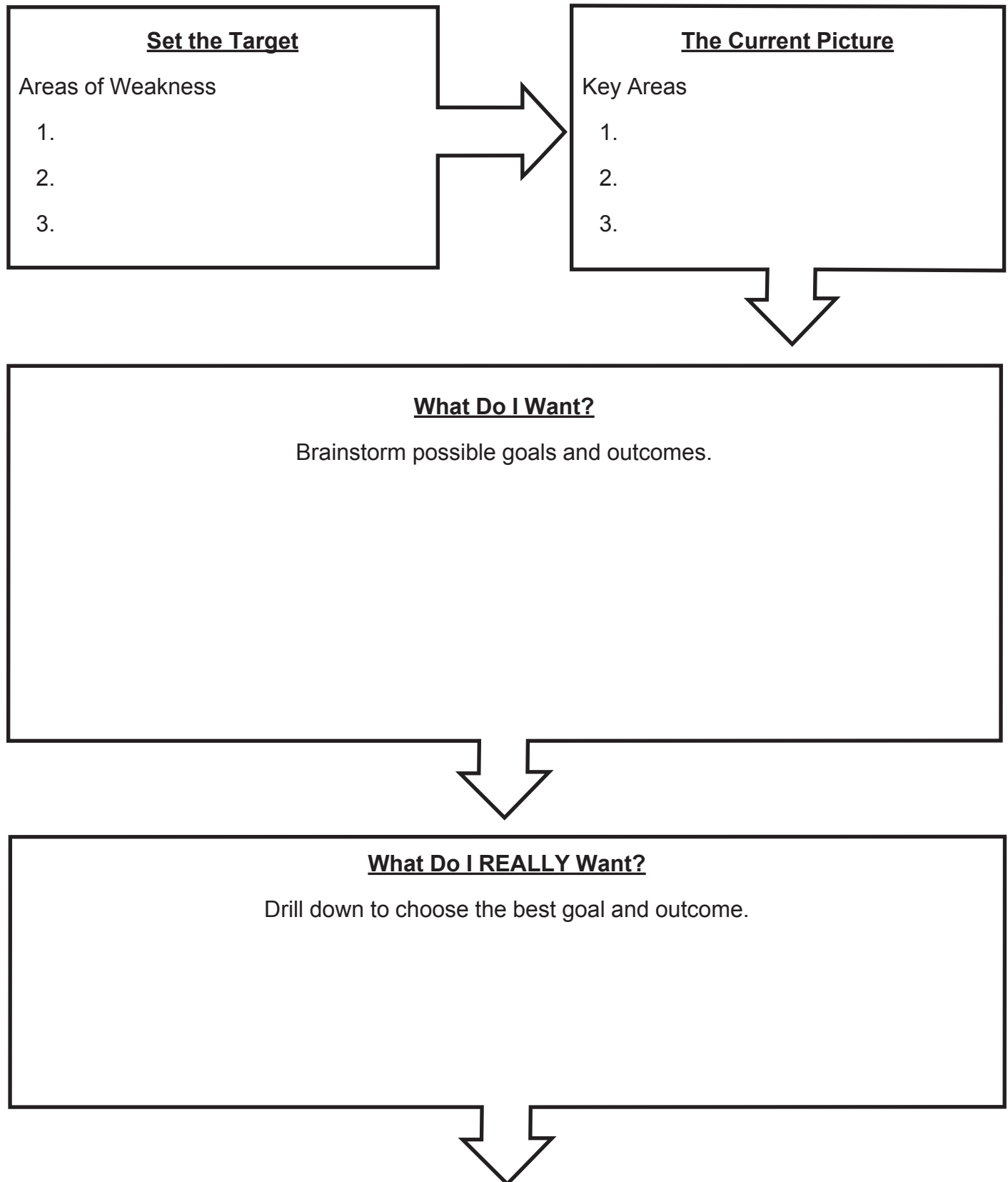
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Human Resource Management. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Human Resource Management** worksheet.

SMART Goals for Human Resource Management



Make sure it meets each characteristic.

<u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none">• Who?• What?• When?• Where?• How?	
<u>MEASURABLE</u> How will I measure it? <ul style="list-style-type: none">• How much?• How many?• How will I know it has been accomplished?	
<u>ACHIEVABLE</u> Is this something I can do? <ul style="list-style-type: none">• Am I prepared to make the commitment?• Am I willing to make major changes?• Is there a more achievable goal?	
<u>RELEVANT</u> Is this based on forecasted needs? <ul style="list-style-type: none">• Do I have the resources?• Does it make sense for my program?• Does it align with my priorities and needs?	
<u>TIME-BOUND</u> Does the time frame create a practical sense of urgency? <ul style="list-style-type: none">• What can I do TODAY to reach my goal?• What can I do one week from now?• What can I do one month from now?	
MY SMART GOAL IS:	

Workplace Safety for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 ¼ hours



Key Area: 3 (Administration)

USDA Professional Standards Codes: 3240, 3450

2024

11/25/2024

Lesson Objectives

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

- Identify principles of creating and maintaining a safe work environment.
- Describe the role of the school nutrition program in emergency preparedness.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Identify principles of creating and maintaining a safe work environment.			
45 minutes	<ul style="list-style-type: none"> • Lesson Objectives • Workplace Safety and Accident Prevention • Workplace Security • OSHA • Wrap Up • Conclusion – SMART Goals 	<ul style="list-style-type: none"> • Role of the School Nutrition Director • Accident Prevention: You Are the Key • Workplace Security Scenarios • Security Checklist 	<ul style="list-style-type: none"> • Participant's Workbook • <i>Role of the School Nutrition Director</i> handout • <i>Accident Prevention—You Are the Key</i> handout • <i>Sample Safety Meeting Schedule</i> handout • <i>Workplace Security Scenarios</i> worksheet • <i>Security Checklist</i> worksheet • <i>Working with OSHA</i> worksheet
Total: 45 minutes			

Workplace Safety

SHOW SLIDE: Workplace Safety and Emergency Preparedness

SAY: Welcome to Workplace Safety, an Introduction to School Nutrition Leadership lesson for school nutrition directors. Think about the environment where you work. There are slip hazards, hot stoves, and knives used during preparation. Knowing how to create and maintain a safe work environment will protect your staff from these hazards.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

SAY: In this part of the lesson, we are going to talk about workplace safety.

Objective: Identify principles of creating and maintaining a safe work environment.

DO: Have a chart paper available and write down the responses to the questions.

SAY: Take a minute to think about some of the things that can go wrong in the school foodservice workplace. Let's share some ideas.

FEEDBACK:

- Falls on wet floors or over a piece of cleaning equipment left in the traffic lane
- Burns from hot food, hot equipment, hot water or the dishwasher
- Burns from chemicals used for cleaning
- Acquires injury from improper lifting techniques or falling objects
- Equipment or small wares which need repair or replacement—worn pot holders causing burns or slicers without guards causing cuts
- Staff sickness like Norovirus

ASK: What words makes you think of workplace safety?

FEEDBACK:

- Policies
- Procedures
- Work safety training
- Work safety monitoring

SHOW SLIDE: Workplace Safety

SAY: If you were to use your favorite search engine for the definition of workplace safety, you would find that, workplace safety is defined as a set of policies and procedures that are in place to ensure the safety and health of employees within a workplace. As you have just stated in the brainstorming session we just completed, workplace safety can have many parts.

A safe working environment is critical to the integrity of a SNP. The district director provides the leadership needed to maintain a safe work environment in all facilities on an ongoing basis. The director must provide a focus on ensuring the safety of employees, preventing accidents, and using resources responsibly to maximize a safe work environment for everyone.

DO: Review **Role of the School Nutrition Director** handout.

SHOW SLIDE: Role of the School Nutrition Director

DO: Have participant's review *Role of the School Nutrition Director* handout.

Role of the School Nutrition Director

Supervise the implementation and evaluation of a safe work environment in each school. While the actual implementation of a safe work environment takes place at the school site, the director must:

- Know and implement all regulations and requirements that are applicable to a safe work environment
- Provide resources needed for school-based personnel to support a safe work environment (such as appropriate work clothing, equipment, etc.)
- Establish standards for safety
- Monitor safety practices during school visits
- Develop good working relationships with maintenance and security staff
- Establish and maintain ongoing training on safety practices
- Evaluate safety practices routinely

SAY: In the next section of this lesson, we will identify actions and resources to foster a safe work environment, stress the importance of prevention, apply corrective actions, and promote accident prevention.

SHOW SLIDE: **Activity: Accident Prevention—You Are the Key**

ACTIVITY: Accident Prevention—You Are the Key

Materials: Accident Prevention—You Are the Key worksheet

Time: 5 minutes

Instructions: Have participants get into groups. They will write a preventive or corrective action next to the potential accident listed on the **Accident Prevention—You Are the Key** worksheet. Have them pick one more potential accident and enter it in the last box on the left and write down the preventive or corrective action.

SAY: Turn to the **Accident Prevention—You Are the Key** worksheet in your workbook. Identify corrective actions you should take to prevent an accident and demonstrate an attitude of safety. In your groups please write a preventive or corrective action next to the potential accident listed. Pick one more potential accident and enter it in the last box on the left and write down the preventive or corrective action.

Instructor's Note: *The italicized information on the following chart is intended as examples and does not appear in the Participant's Workbook. Answers will vary.*

Accident Prevention—You Are the Key

Potential Accident	Preventative or Corrective Actions
An employee does not notice the water spilling on the floor as she carries a pan to the steam table and organizes the serving line.	<ul style="list-style-type: none"> • <i>Always use a cart.</i> • <i>Announce clearly and loudly there is a spill on the floor and the location to alert staff to the hazard.</i> • <i>Mark any wet floor areas with cones to keep people out of the area.</i> • <i>Wipe up ANY spills (water, grease, food, etc.) you see on the floor whether it has been spilled by you or someone else.</i>
The staff just completed a workplace safety class that stressed the importance of proper lifting techniques. Many employees continue to bend from the waist to pick up pans that are stored below the prep tables or to pick up cases stored on the floor or in the cooler/storeroom/freezer.	<ul style="list-style-type: none"> • <i>Remind employees of the safety training and why it is important to lift safely.</i> • <i>Continue the reminders until employees are lifting safely.</i>
Some of the pot holders in the hot food preparation area and on the serving lines have holes or are wearing thin.	<ul style="list-style-type: none"> • <i>Remove the potholders that are in poor condition.</i> • <i>Offer suggestions as to the type of pot holders to order.</i>

SHOW SLIDE: Effective Safety Programs

SAY: Effective safety programs have several critical components. The first step towards having an effective safety plan is coordinating SNP efforts with other departments and functional areas of the school district. By working in partnership with other department leaders, the school nutrition director gains access to their experience, knowledge, and activities and ensures school-wide security. The *Sample Safety Meeting Schedule* handout can be found in the Participant's Workbook. This handout provides examples of safety meetings that can be used in a school nutrition program.

Sample Safety Meeting Schedule

Month	Topic
September 26	Safe Lifting Techniques
October 24	Preventing Slips and Falls
November 14	Hot Stuff – Preventing Burns
December 19	Prevent Employee Cuts
January 16	What to Do in the Event of Fire
February 20	Proper Chemical Storage and Use
March 12	Using Carts to Transport Items
April 23	Safe Storage (time limits, placement, heavier items on bottom, no glass above arm level, etc.)
May 21	Equipment and Clothing

SAY: A key element in an effective safety program is a regular system of training. Often school nutrition managers are trained and then they become the trainer for their employees. Other sources of safety education are webcasts, virtual meetings, guest speakers, and individual learning modules.

SHOW SLIDE: *Security in Schools*

SAY: School violence is a potential danger for students and employees alike. Security in the school kitchen must be part of the school's overall security plan. The school nutrition director must work collaboratively with district and campus administrators to develop a kitchen security plan that includes emergency procedures to ensure that all employees know what to do when faced with a variety of violent or dangerous situations.

SHOW SLIDE: *Back Door Security Measures*

ASK: The kitchen entry from outside is a critical component of the campus security plan; can you think why this is so?

DO: Allow a minute for several participants to answer.

FEEDBACK:

The door into the kitchen from outside is one of the most vulnerable entrances into the entire facility. Typically, this door is not monitored and sees heavy traffic as employees, visitors, health inspectors, and repair personnel enter and leave, deliveries arrive, etc.

ASK: Can you think of anything that can be done to increase the security of this entrance?

DO: Allow time for a few participants to answer.

FEEDBACK:

Security measures for the kitchen back door may include:

- Locks
- Peepholes
- Security cameras
- Keyless entry
- Security alarms
- Electronic sensors
- Motion detectors

SAY: Interior doors such as those separating the cafeteria seating area from serving lines also pose security concerns. Are these doors secured from within the kitchen itself? Who can open, lock, or unlock these doors? Who has keys for these doors? To help us think about security in the kitchen, turn to the scenarios that present a variety of security concerns related to the SNPs. I will assign the scenarios to your groups. The following scenarios are for the purpose of this activity. Questions on school security measures in your district consult Superintendent or the Director of the school security office.

SHOW SLIDE: *Activity: Workplace Security Scenarios*

ACTIVITY: Workplace Security Scenarios

Materials: Workplace Security Scenarios worksheet

Time: 10 minutes

Instructions: Assign each group a scenario to read from the **Workplace Security Scenarios** worksheet and have 5 minutes to review and answer the questions at the end. Each team will identify one group member to read their group's scenario, the questions, and answers to the class.

SAY: Each group will be assigned a scenario to read from the **Workplace Security Scenarios** worksheet and have 5 minutes to review and answer the questions at the end. Each team will identify one group member to read their group's scenario, the questions, and answers to the class. **Please follow your school district's policy regarding security situations.**

We will now discuss three scenarios related to workplace security. I will divide you into groups and assign a scenario for each group. We will then discuss your responses together.

Workplace Security Scenarios

Workplace Security Scenario #1

It is 10:30 AM, and the staff is preparing for lunch service. The milkman is halfway finished with delivering the milk order. The back door is propped open so that he may deliver more rapidly. The school loudspeaker suddenly blares that there is an emergency, and the school is going into lockdown. What should your school nutrition staff do and in what order?

- **School security experts advise closing and locking the door immediately. If the delivery person is inside the kitchen, he joins the school nutrition staff in gathering and waiting at the pre-designated location, behind locked doors. If the delivery person is outside the cafeteria when the lockdown is announced, he would be required to come inside the kitchen.**

Workplace Security Scenario #2

It is 11:15 AM. Dozens of students are in various cafeteria serving lines waiting to be served lunch. The cafeteria lines are arranged so that customers enter through one door, walk along the serving line, make their choices, get charged by the cashier, and exit through a different door. Two school nutrition employees are outside at the dumpster emptying trash. The school loudspeaker suddenly blares that there is an emergency, and the school is going into lockdown. What should your staff do and in what order? What about the students waiting in line? What about the employees who are outside?

- **School security experts advise that students inside the serving line areas join the school nutrition staff in the designated safe location of the kitchen. Employees outside the kitchen are also ordered to run back into the kitchen and into the designated safe place.**

Workplace Security Scenario #3 – Part 1

Jennifer has worked in school nutrition for 8 years and is an outstanding employee. Her husband always picks her up from work since she does not drive. The usual routine is that he pulls his car up to the back door of the kitchen and waits there for her. Sometimes, if Jennifer has to work a few minutes past her regularly scheduled hours, he will wait inside the kitchen near the back door. Everyone in the kitchen knows Jennifer's husband, and he even sometimes comes and has lunch with Jennifer and the rest of the crew. He has an engaging personality and everyone finds him a nice and friendly man totally devoted to Jennifer. Is there anything wrong with this picture?

Workplace Security Scenario #3 – Part 2

You notice that today Jennifer does not seem to be herself. She tells you that maybe she's coming down with a cold but that everything is fine. Near the end of the day Jennifer's husband drives up as usual. He appears at the back door, and one of the employees opens the door for him. What nobody knows is that last night, Jennifer told her husband that she is going to leave him. In fact, she walked out on him last night. Unknown to your staff, he has a pistol under his shirt and is determined to keep Jennifer from leaving him at any cost. Is there anything wrong with letting Jennifer's husband wait inside the kitchen for his wife?

- **Visitors need to check in with the front office whenever they visit the school. A seemingly safe and regular practice can turn tragic in a moment. Do not compromise the school nutrition security plan. The best way to prepare for emergencies is through training and increased awareness. Key security questions for school nutrition directors to answer are included on the Security Checklist. In addition, food safety policies and procedures may restrict visitors from entering food preparation areas.**

SHOW SLIDE: Activity: Security Checklist

ACTIVITY: Security Checklist

Materials: Security Checklist handout

Time: 5 minutes

Instructions: Have participants review the questions and resolve to take steps to ensure that a workplace security plan is in place in your program.

SAY: Locate the **Security Checklist** handout in the Participant's Workbook. Take a minute to review the questions and resolve to take steps to ensure that a workplace security plan is in place in your program.

Instructor's Note: *There are no wrong or right answers for the Security Checklist worksheet. Participants should answer the questions based on their program.*

Security Checklist

Instructions: Review the questions on the security checklist and write the measures you employ for each. If you do not have any, resolve to take steps to ensure that a workplace security plan is in place:

1. Do your employees know what to do if the campus calls for a lockdown?
2. If the campus calls for a lockdown, do you have set procedures for handling the following people? What are they?
 - a. Vendors:
 - b. Visitors:
 - c. Students waiting in line:
 - d. Spouses or other family members:
 - e. People (students, staff, etc.) who may be outside the school building when a lockdown is announced:
 - f. Any other contingencies:
3. Do you have a designated “safe space” area of the kitchen for employees to gather?
4. Are flashlights and other emergency equipment, such as first aid kits, available in case of power failure or other emergency?
5. Is there a way for school nutrition staff to communicate with the outside world if phone lines are cut and the staff is locked down in the kitchen?
6. Do employees know what takes precedence: a fire alarm or a lockdown?
7. Do employees know how to report an emergency to the school staff?
8. Can school nutrition employees call for a lockdown?
9. Do employees know which equipment to turn off or render harmless in case a lockdown is called during a peak cooking time?

SAY: All the questions/actions on the checklist must be coordinated and integrated into the school facility's security plan. Most schools have a security plan in place. Be sure that you and your staff are included in the plan and future planning for workplace security issues.

SHOW SLIDE: *Occupational Safety and Health Administration (OSHA)*

SAY: The Occupational Safety and Health Act of 1970 created the Occupational Safety and Health Administration (OSHA) to help employers and employees reduce injuries, illnesses, and deaths on the job. OSHA's mission is to ensure the safety and health of America's workers by:

- Setting and enforcing standards
- Providing training, outreach, and education
- Establishing partnerships
- Encouraging continual improvement in workplace safety and health

ASK: Does anyone here know who is covered by OSHA? Are you?

FEEDBACK:

If you work in the private sector, you are covered by the Federal OSHA or an OSHA program operated by your State government. The OSHA Act authorizes states to establish their own safety and health programs with OSHA's approval so long as they provide protection equivalent to that provided under Federal OSHA regulations.

SAY: Do you know what employees' rights are under OSHA? Your Participant's Workbook contains helpful information in working with OSHA, and you are encouraged to review these employee rights and obligations under OSHA.

DO: Review the **Working with OSHA** handout from the Participant's Workbook with the participants.

Working with OSHA

- Get training from your employer as required by OSHA standards.
- Request information from your employer about OSHA standards, worker injuries and illnesses, job hazards, and workers' rights.
- Request action from your employer to correct hazards or violations.
- File a complaint with OSHA if you believe that there are either violations of OSHA standards or serious workplace hazards.
- Be involved in OSHA's inspection of your workplace.
- Find out results of an OSHA inspection.
- Get involved in any meetings or hearings to discuss any objections your employer has to OSHA's citations or to changes in abatement deadlines.
- File a formal appeal of deadlines for correction of hazards.
- File a discrimination complaint.
- Request a research investigation on possible workplace health hazards.
- Provide comments and testimony to OSHA during rulemaking on new standards.
- For information regarding maintaining a safe and healthy work environment and the Occupational Safety and Health Administration (OSHA), a government agency in the Department of Labor, go to osha.gov or call (800) 321-OSHA.

SAY: For more information regarding maintaining a safe and healthy work environment and the Occupational Safety and Health Administration (OSHA), a government agency in the Department of Labor, go to osha.gov or call (800) 321-OSHA.

Each of you plays an important role in keeping workers, students, staff, and others safe by promoting accident prevention and security in the kitchen and other work areas. Ensuring a safe work environment is critical to meeting the important goal of feeding children healthful, nutritious meals through a sound SNP.

WRAP UP

SAY: In this lesson, we discussed the principles involved in creating and maintaining a safe workplace. You also had a chance to brainstorm ideas on how to respond to workplace safety issues and ideas for training your staff when you return to your operations.

SHOW SLIDE: **Conclusion – Workplace Safety**

SAY: We will now create a SMART goal for this lesson.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers – how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

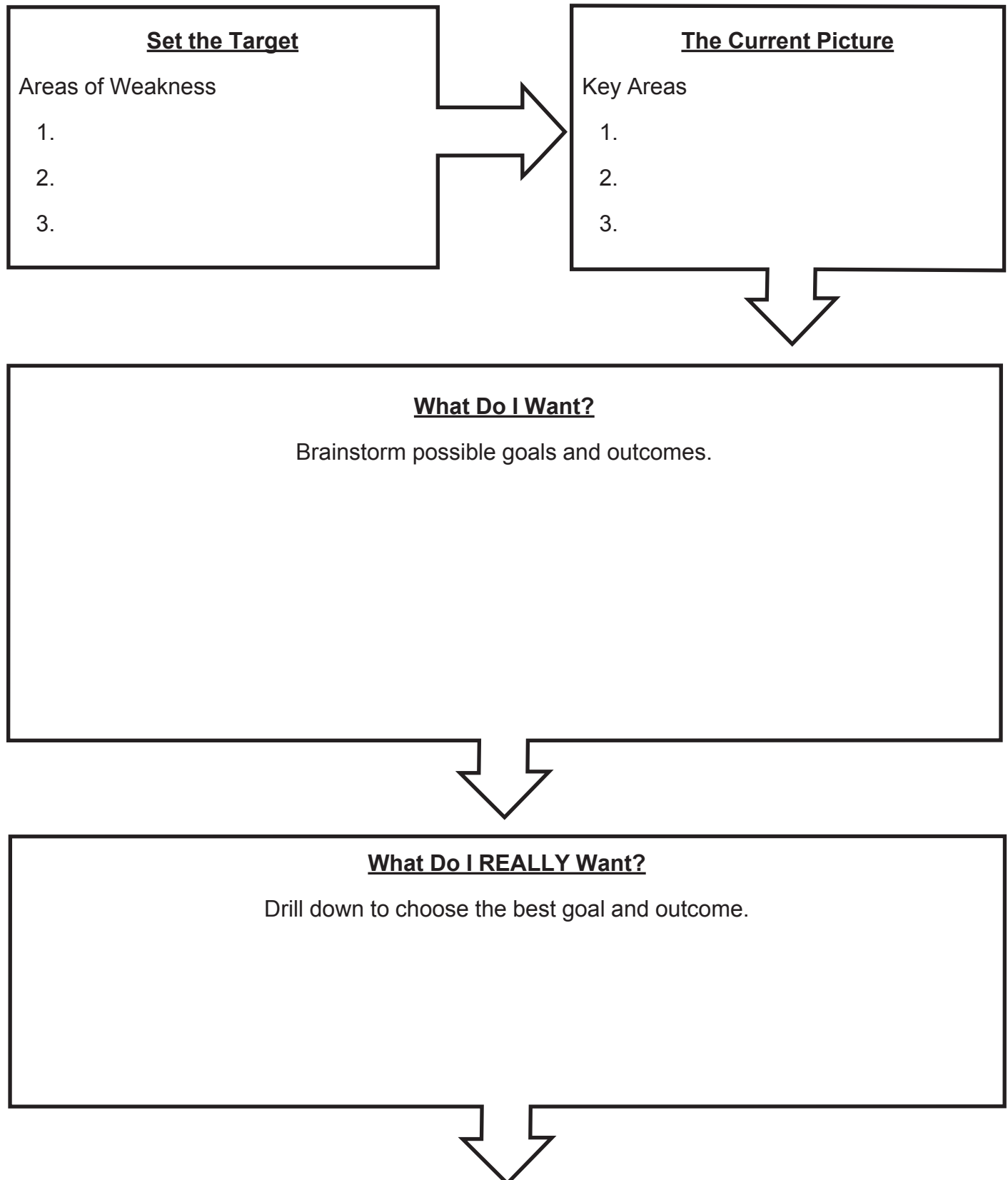
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal in the area of Work Place Safety. Having a SMART goal in place when you return to your program will help you focus on improving your CNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Workplace Safety** worksheet.

SMART Goals for Workplace Safety



Make sure it meets each characteristic.

<u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none">• Who?• What?• When?• Where?• How?	
<u>MEASURABLE</u> How will I measure it? <ul style="list-style-type: none">• How much?• How many?• How will I know it has been accomplished?	
<u>ACHIEVABLE</u> Is this something I can do? <ul style="list-style-type: none">• Am I prepared to make the commitment?• Am I willing to make major changes?• Is there a more achievable goal?	
<u>RELEVANT</u> Is this based on forecasted needs? <ul style="list-style-type: none">• Do I have the resources?• Does it make sense for my program?• Does it align with my priorities and needs?	
<u>TIME-BOUND</u> Does the time frame create a practical sense of urgency? <ul style="list-style-type: none">• What can I do TODAY to reach my goal?• What can I do one week from now?• What can I do one month from now?	
MY SMART GOAL IS:	

Wrap Up for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 30 minutes



**Key Areas: 1 (Nutrition), 2 (Operations), 3 (Administration),
4 (Communications and Marketing)**

USDA Professional Standards Codes: 1000, 2000, 3000, 4000

2024

11/25/2024

Lesson Objectives

At the end of this lesson, participants will accomplish the following objectives.

- Describe various methods of organizing responsibilities, time, personnel, and resources.
- Reflect on the key concepts learned from each of the school nutrition topics.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Describe various methods of organizing responsibilities, time, personnel, and resources.			
25 minutes	<ul style="list-style-type: none"> • Lesson Objectives • Organization Management • Organization of Personnel • Conclusion - SMART Goals 	<ul style="list-style-type: none"> • Office Organization • Calendar of Responsibilities • A Tale of Two New Directors 	<ul style="list-style-type: none"> • Participant's Workbook • Chart paper • <i>Calendar of Responsibilities</i> handout • <i>A Tale of Two New Directors</i> handout
Objective: Reflect on the key concepts learned from each of the school nutrition topics.			
5 minutes	<ul style="list-style-type: none"> • Goal Setting and Evaluation • SMART Goals 		Participant's Workbook
Total: 30 minutes			

Wrap Up

SHOW SLIDE: Wrap Up

SAY: Welcome to Wrap Up for Introduction to School Nutrition Leadership. As we come to the conclusion of our class, it's important that we reflect on what we've learned this week. I'm sure your head is full of new knowledge and insights into school nutrition (SN) leadership. A school nutrition director is accountable for many areas of responsibility and must lead the program with professional integrity.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

Objective: Describe various methods of organizing responsibilities, time, personnel, and resources.

SHOW SLIDE: Organization Management

SAY: Because of the broad areas of responsibility in your position, it is imperative that you find methods of organizing your files in your office. Although much information is stored on computer files, there is still a need to have paper files properly organized and easily accessible.

Let's brainstorm on the various files you will need in your office.

DO: Give instructions for the following activity.

SHOW SLIDE: Activity: Office Organization

ACTIVITY: Office Organization

Materials: chart paper

Time: 5 minutes

Instructions: Have participants take a few minutes to discuss the organization of their office. Have them use a piece of chart paper, work as team to make a list of the most important files they need and other characteristics of a well-organized office.

SAY: Let's take a few minutes and discuss the organization of your office. Using a piece of chart paper, work as team to make a list of the most important files you need and other characteristics of a well-organized office. You will have 5 minutes to complete this activity.

DO: Allow 5 minutes for discussion.

FEEDBACK:

- 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
- Master List

SAY: Now let's think about the bigger picture, and how we could organize the yearly responsibilities of your department. We will create a yearly department calendar in this next activity. It's a good practice to do this annually.

SHOW SLIDE: **Activity: Calendar of Responsibilities**

ACTIVITY: Calendar of Responsibilities

Materials: Calendar of Responsibilities worksheet

Time: 10 minutes

Instructions: Have the participants work with their team and develop a calendar of responsibilities. Refer them to the **Calendar of Responsibilities** worksheet in the Participant's Workbook. Begin the calendar in June and include as many activities as possible for each month of the 12-month year.

SAY: Please turn to the **Calendar of Responsibilities** worksheet. 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 enough likeness to allow you to organize the responsibilities of your department in an efficient calendar format. You will have 10 minutes to complete this activity.

DO: Allow participants 5 minutes to discuss.

Calendar of Responsibilities

Month	Responsibilities				
June					
July					
August					
September					
October					
November					
December					
January					
February					
March					
April					
May					

SAY: 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
- State reports

DO: Allow for discussion.

SAY: It's important that you develop your own calendar with the tasks and due dates for your system. 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.

Another important piece of information you will need to manage is the professional standards requirement for training of you and your staff. We briefly reviewed the requirements on Monday.

ORGANIZATION OF PERSONNEL

SHOW SLIDE: Organization of Personnel

SAY: Now that you have the information and responsibilities organized, you will need to gain some skills in working with the people in your office and in the schools. This can be challenging for a new director. Your staff can be your greatest asset. We want to share some guidance on how to build a team that thrives especially when you're brand new to the position.

We want to give you a comparison of two very different ways of approaching leadership of your staff. In your Participant's Workbook, you have two case studies of two new directors. Read these case studies and answer the questions at your table. You will have 5 minutes.

SHOW SLIDE: Activity: A Tale of Two New Directors

ACTIVITY: A Tale of Two New Directors

Materials: A Tale of Two New Directors worksheet

Time: 10 minutes

Instructions: Have participants review the **A Tale of Two Directors** worksheet in the Participant's Workbook, answer the questions that follow, and we will discuss as a group.

DO: Give participants 5 minutes to review the **A Tale of Two Directors** worksheet.

SAY: Let's discuss what you observed from these different leadership styles.

FEEDBACK:

- Seek input from those you lead to build trust.
- Implement change slowly.
- Spend time in the schools working with staff.
- Involve stakeholders in decision making.
- Show sincere appreciation.
- Do formal and informal recognition of others.
- Accept responsibility when things go wrong.
- Give credit to the team when things go well.
- Grow yourself through reading books.
- Find a mentor who works well with people.

A Tale of Two Directors

Background information of ABC School District:

- 12 schools in the district representing elementary, middle, and high schools
- School nutrition program is experiencing financial challenges and the student participation is low
- Current director is retiring after being in that position for 15 years

I'm the Boss!

Brenda loves a challenge and is excited to be working at ABC School District. With her experience in operating foodservice in the retail world, she knows that she can turn this school nutrition program around in a short matter of time. The superintendent has given her a mandate of turning a profit and improving the program in all areas.

With the mandate by the superintendent, she feels the pressure to turn this program around quickly and take complete charge. She studies the reports from the schools and develops goals for each one, and meets with the staff to tell them her expectations. When they complain that some of the goals are not feasible given their particular school situation, she disregards their concerns. The answer to improving the bottom line lies in controlling every detail from the central office. She doesn't seek input from her managers, for her way worked fine in the restaurant world so she believes that it will work in the school system, too.

She has made many big changes during her first year and has been so busy working at the office that she has very little time to be out in the schools observing the operations. In order to save money, Brenda has removed many favorite entrée items and the high school students are complaining. The employees do not feel comfortable making suggestions for fear of losing their jobs.

I'm Here to Serve!

Sue was a registered dietitian for the local hospital when she was chosen to be the new school nutrition director. Since working in a school system is different, Sue sought the guidance of a seasoned school nutrition director. In addition, she met with the retiring director and the superintendent to find out more about the program and to gain insight into working with the schools.

She received some valuable advice from mentors that she needed to implement change slowly. Her first goal was to gain the trust of the employees. So, Sue met individually with the managers to find out more about them personally, what they liked best about their jobs, and what challenges they faced. She asked them questions about what needed to be changed to make their jobs better. She also was a frequent visitor to the schools and often worked in the kitchens alongside the staff to see the operation from their perspective. Soon, the staffs realized she was truly interested in helping them and not in being the boss with all the answers.

After gathering information and studying past reports, Sue began to formulate some plans that would help the system become more financially stable. She shared these with the managers and her office staff to get their input too. Afterwards, she developed a 2–5 year plan of goals so that she and the staff could pace themselves in the accomplishment of their plans. She also planned training sessions for those areas where their processes would be changed and kept in communication with the managers at the schools. She had an open door policy and was open to discussing concerns and suggestions with them.

- 1. Which director do you think made the most progress toward reaching the goals of the program? Why?**
- 2. Discuss a few of the key differences between these two leadership styles.**
- 3. What can you apply to your own position as a new director/coordinator?**

SAY: Remember as a new director it takes time to build relationships with your employees. Your employees are an invaluable resource to your school nutrition program. Having regular meetings with employees will help you to grow your school nutrition program together.

SHOW SLIDE: Resources

SAY: As the leader of the SNP in your system, there are a variety of resources to help you with your school nutrition program.

Let's look at the many different resources at your disposal.

- USDA
 - Policy Memo Sections
 - Team Nutrition
 - Best Practices Link
 - Food Recalls Procedures
- Your State Department
 - Training and Guidance
- Institute of Child Nutrition
 - i Learn Courses
 - Live Training Opportunities
 - Research Based Training Materials
- School Nutrition Association and your State SNA
- Other directors in your Area or State
- Area Cooperatives of Directors
- Webinars

Objective: Reflect on the key concepts learned from each of the school nutrition topics.

SHOW SLIDE: Goal Setting and Evaluation

SAY: As we go forward from this training we want to help you set goals for yourself. Throughout the week we have covered a variety of topics. Are there many things that you want to go back and do as a result of this training? Let's talk about setting short range and long range plans.

SHOW SLIDE: Short and Long Range Goals

SAY: Short range goals are those you want to accomplish in the next year. Long range goals are those that are 2–5 years in the future. Here are some pointers to consider:

- Gather information
 - Assess if it's critical or just basic improvement
 - How much time will it take?
 - What other resources will I need?

SHOW SLIDE: Final Wrap Up

SAY: We will now create a SMART goal for this training. As you have previously worked through the development process, we now want to utilize this skill to develop a goal for your school nutrition program. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal for your SNP.

S (specific) – The goal needs to indicate the five *Ws*: who, what, when, where, and why.

M (measurable) – There needs to be a quantitative goal line. Think numbers – how many or how much. This characteristic will let us know when the goal has been met.

A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

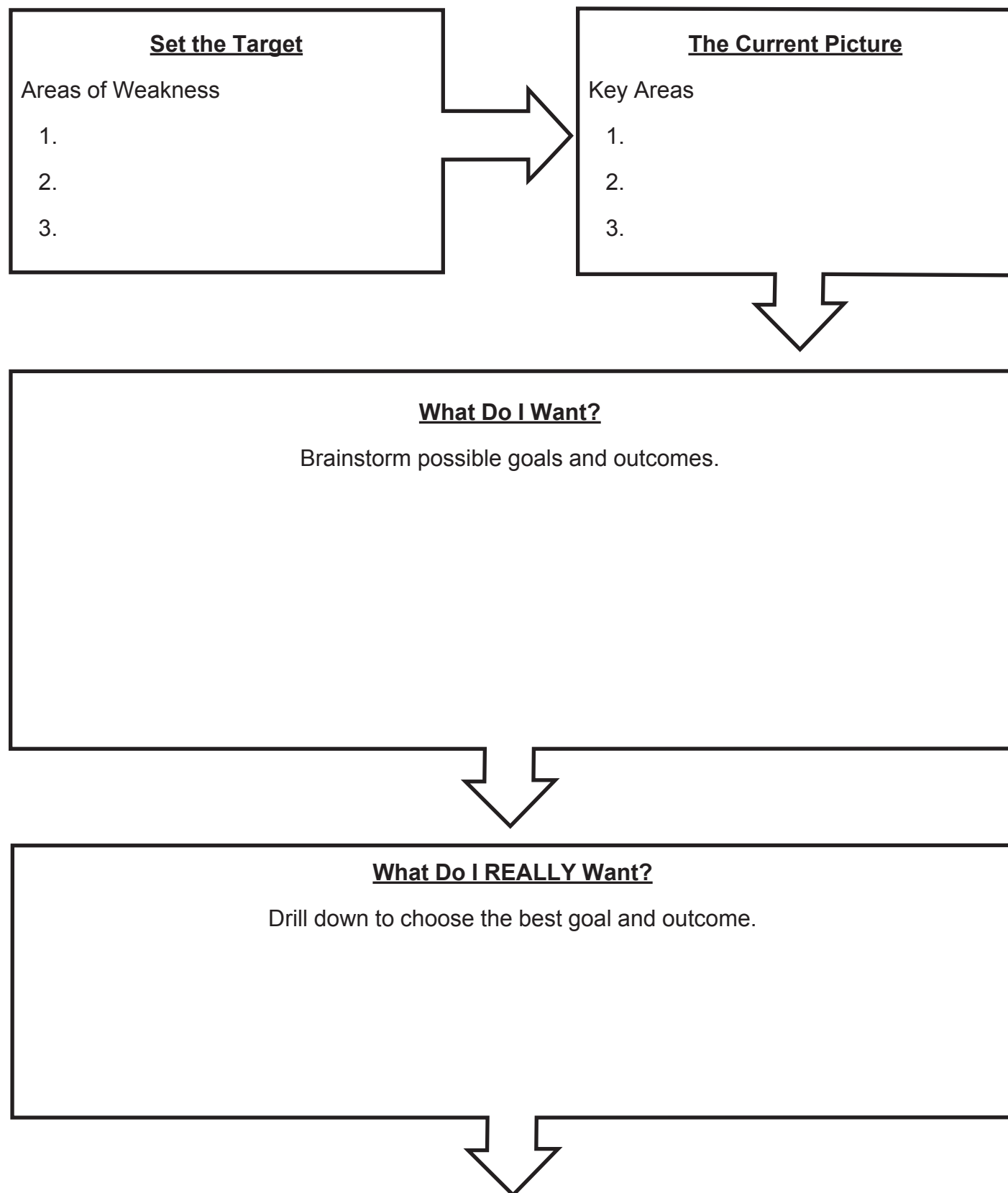
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

T (time-bound) – There should be a time frame in the goal that creates a practical sense of urgency for our staff.

Think back over this lesson, the objectives we covered, and how it all relates to your program. Take a few minutes to reflect on how you can use the information you learned to help improve your program.

As you have previously worked through the development process, we now want to utilize this skill to develop a goal for your school nutrition program. Having a SMART goal in place when you return to your program will help you focus on improving your SNP in the targeted area of this lesson. Now, use the questions for each characteristic to create your SMART goal using the **SMART Goals for Your SNP** worksheet.

SMART Goals for Your SNP



Make sure it meets each characteristic.

<u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none">• Who?• What?• When?• Where?• How?	
<u>MEASURABLE</u> How will I measure it? <ul style="list-style-type: none">• How much?• How many?• How will I know it has been accomplished?	
<u>ACHIEVABLE</u> Is this something I can do? <ul style="list-style-type: none">• Am I prepared to make the commitment?• Am I willing to make major changes?• Is there a more achievable goal?	
<u>RELEVANT</u> Is this based on forecasted needs? <ul style="list-style-type: none">• Do I have the resources?• Does it make sense for my program?• Does it align with my priorities and needs?	
<u>TIME-BOUND</u> Does the time frame create a practical sense of urgency? <ul style="list-style-type: none">• What can I do TODAY to reach my goal?• What can I do one week from now?• What can I do one month from now?	
MY SMART GOAL IS:	

SAY: Let's review our chart page we recorded on Monday of what you wanted to learn. I will state each topic and you tell me if we covered it. Thank you for such a great week of *Introduction to School Nutrition Leadership*!

DO:

- Post Assessment
- Class Evaluation
- Certificates

Appendix for Introduction to School Nutrition Leadership

Instructor's Manual



2024

11/25/2024

Key Terms

A.

Accountability – Firm adherence to a code of especially moral or artistic value; an unpaired condition; the quality or state of being complete or undivided.

Accounts Payable – The amount the school nutrition program owes, but has not yet paid, for goods delivered and services rendered (unpaid bills).

Accounts Receivable – The amount of funds the school nutrition program has earned, but not yet collected, for services provided. Examples include meal reimbursement due from State and Federal sources, and payments due from customers for such services as catering special school events, outside sales, and contract meals.

ADA – Americans with Disabilities Act

Advertising – A direct or commercial way of marketing and a form of selling that includes informing, getting attention, and praising something.

Agent – An agent is a person who is authorized to act for another through employment, by contract, or apparent authority. A School Food Authority (SFA) can contract with a Food Service Management Company (FSMC) to manage its foodservices and act as its procurement agent for acquiring its goods and services. The SFA must ensure that its procurement solicitation and contract used to hire the vendor identifies the scope of duties the FSMC must fulfill and the FSMC's responsibilities as the agent of the SFA.

Aggregate Award – An aggregate award is the process of awarding a contract by categories for like items. Examples include awarding all the canned foods, staples, frozen foods, milk, other dairy products, or bakery items for a specific period of time.

Agricultural Marketing Service (AMS) – The U.S. Department of Agriculture's Agricultural Marketing Service (AMS) administers programs that facilitate the efficient, fair marketing of U.S. agricultural products, including food, fiber, and specialty crops.

Arms-Length Transaction – An arms-length transaction is a transaction in which the parties are dealing from equal bargaining positions; neither party is subject to the other's control or dominant influence, and the transaction is treated with fairness, integrity and legality.

Aspirate – An occurrence in which all or part of a food/liquid bolus enters the airway.

Assets – Something of value held by the school nutrition program for use in carrying out its mission. Examples include cash; amounts receivable; inventories of purchased food, USDA Foods, and supplies; equipment and other capital assets; etc.

Average Daily Participation (ADP) – The average number of student reimbursable meals served in the school nutrition program on a daily basis.

B.

Bond – A bond is an insurance agreement pledging surety for financial loss caused in connection with the contract. Essentially, a bond provides assurance to the school district that, if a loss occurs in connection with a contract related to their school nutrition operations, the loss will be covered to the extent agreed upon in the bond.

Brokers – Brokers are independent sales agents who negotiate sales for manufacturers by working with food distributors and school nutrition operations. The broker assists manufacturers by introducing new products to the school nutrition market. Brokers can assist the SFA staff by providing samples for taste-testing to the districts.

Budget – A financial management plan for a specified future period of time, generally a fiscal year. The budget systematically considers planned activities and objectives for that period, forecasts the costs to carry out activities, and identifies the revenues projected to cover costs.

Buy American – The Buy American provision (in section 12(n) of the National School Lunch Act) requires schools to purchase, to the maximum extent practicable, domestic commodities and products. A domestic commodity or product means an agricultural commodity that is processed in the United States, and/or a food product that is processed in the United States substantially using agricultural commodities that are produced in the United States. Purchases made in accordance with the Buy American provision must still follow the applicable procurement rules calling for free and open competition. Any entity that purchases food or food products on behalf of the School Food Authority (SFA) must follow the same Buy American provisions that the SFA is required to follow.

C.

Capital Assets – Tangible personal property including equipment, technology hardware, software, vehicles, or furniture that is with a unit acquisition at or above a stated dollar amount, called the capitalization threshold, and a useful life greater than one year. The business entity sets the capitalization threshold.

Capitalization – Capitalization is the amount and source of money needed to start and operate a business like a cooperative purchasing group.

Cerebral palsy – A disorder where there has been an injury to the developing brain early in life; symptoms include increased muscle tone and abnormal motor patterns and postures; some have low muscle tone.

Chemical hazard – Chemical hazards occur when a harmful chemical gets into a food that is then eaten by a person. The term also refers to harm to employees who handle and use chemicals in the course of their work.

Child Nutrition (CN) Labeling Program – The U.S. Department of Agriculture (USDA), Child Nutrition (CN) Labeling Program provides food manufacturers the option to include a standardized food crediting statement on their product label. Labels must be authorized by Food and Nutrition Service (FNS) prior to use and manufacturers must have quality control procedures and inspection oversight that meet the FNS requirements. Products produced in accordance with the CN Labeling Program are generally purchased by providers for USDA meal programs.

Coaching – A four-step training technique that involves (1) telling, (2) showing, (3) practicing and providing feedback, and (4) action.

Code of Conduct – A code of conduct is a set of rules outlining the responsibilities of, or proper practices for, an individual or organization. Grantees and subgrantees will maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. A SFA must have a code of conduct governing the performance of the officers, employees, or agents engaged in contract awards and administration when the contract is funded in whole or in part by Food and Nutrition Service (FNS) program funds. In addition, this code governs the methods of procurement, establishes the requirement that the SFA perform a cost or price analysis for every procurement (including contract modifications), and determines which contract clauses and certifications are required in the SFA's contracts.

Collaborate – To work jointly with others, especially in an intellectual endeavor.

Collective Purchasing – Collective purchasing is sometimes referred to as cooperative purchasing and occurs when a group of consumers buys from a particular supplier in order to reduce costs and increase quality.

Competitive Proposals (previously known as Competitive Negotiation) – Competitive proposals [i.e., a Request for Proposals (RFP)] solicit a technical proposal that explains how the prospective vendor will meet the objectives of the solicitation and a cost element that identifies the costs to accomplish the technical proposal. While price alone is not the sole basis for award, price remains the primary consideration when awarding a contract under the competitive proposal method.

Competitive Sealed Bidding – Competitive Sealed Bidding is a formal method of procurement in which sealed bids are publicly solicited [i.e., through an Invitation for Bid (IFB)], resulting in the award of a fixed-price contract to the responsible vendor/bidder whose solicitation is responsive to the IFB, conforms to all the material terms and conditions of the IFB, and is lowest in price. In this case, the IFB must be publicly advertised, and solicitations must be solicited from an adequate number of known suppliers, providing them with sufficient time to respond prior to the date set for opening the solicitations.

Compliance – 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.

Conflict of Interest – A conflict of interest is any action that allows a person to benefit at the expense of the public interest or the expense of their employer.

Contract/Bidder – A contract is a formal, legally enforceable agreement between a buyer (client) and a seller (vendor) that establishes a legally binding obligation for the seller to furnish goods and/or services and for the buyer to compensate the seller. A contract must clearly and accurately describe the goods, products, and/or services to be delivered or performed and the terms and conditions of the agreement. In the case of School Nutrition Programs, a contract is executed by the authorized representatives of the SFA and the vendor that calls for the provision of services, materials, supplies, and/or equipment by the vendor in accordance with all conditions and specifications in the solicitation/proposal documents for a price to be paid by the SFA prior to execution.

Contract Administration System – The contract administration system refers to the policies and procedures the School Food Authority has in place to ensure that vendors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

Contracting Agency – A contracting agency is the grantee or subgrantee that awards the procurement contract.

Cooperative Purchasing – Cooperative purchasing occurs when a group of people join together to accomplish all or part of the steps in the purchasing task. In this reference, a purchasing cooperative consists of a group of school districts. Cooperative purchasing is a system that involves a group purchasing products, reducing costs, and improving the quality of products and services available to members.

Cost Controls – The systems and procedures established to provide reasonable assurance that; (1) assets and information are protected and used only for authorized purposes; and (2) reports submitted to management are complete, timely, and free of material misstatement. Examples may include restricted access to cash, computers, and other assets and review of invoices by someone other than the disbursing official before they are approved for payment.

Cost Index – A cost index is a price adjustments based on increases or decreases in labor or material cost standards or indexes that are specifically identified in the (fixed) contract. When using this type of contract, it is important to clearly state that price adjustments should reflect both increases and decreases in the identified index. Additional information on government types of contracts can be located at

Cost-Reimbursable Contract – A cost a reimbursable contract is formal, legally enforceable contract that reimburses the vendor for costs incurred under the contract but does not provide for any other payment to the vendor, with or without a fixed fee. In a cost-reimbursable contract, allowable costs will be paid from the nonprofit school nutrition account to the vendor net of all discounts, rebates, and other applicable credits accruing to or received by the vendor.

Critical Production Area – An element of a food production process that may be particularly sensitive to potential adulteration. Examples may include bulk storage containers, blenders/mixers, or large batch process operations.

Culinary Technique – A step-by-step food preparation method.

Culture – The behaviors and beliefs characteristic of a particular social, ethnic, or age group.

Customer – A person who buys a product or service.

Customer Service – A combination of product, price, presentation, support, information, and delivery that has value to the customer.

D.

Deferred Income – A liability account that represents revenues collected before they become due. An example of this is revenue received as prepayment for school meals.

Diabetes – A disorder in which the body is unable to produce or respond to insulin.

Direct Marketing or Commercial Marketing – The process of promoting and selling a product or service.

Disability – A physical or mental impairment which substantially limits one or more major life activities.

Distributor – A distributor is a commercial food company that purchases, receives, and/or stores commercial food products. Distributors sell, deliver, and bill the recipient agency for goods and/or services provided. A distributor sells the products made by manufacturers.

Down Syndrome – A disorder of the chromosomes; the infant may be born with a heart defect; it is common for the infant to have slanted eyes, flattened nose, low-set ears, and low muscle tone, and feeding problems; cognitive and motor skills are slow to develop.

E.

Electronic/E-Procurement Procurement – Electronic/E-Procurement Procurement is the term used to describe the use of electronic methods at every stage of the purchasing process, from identification of solicitation requirements to payment, and to potentially establish contracts.

Emergency Preparedness Plan – An emergency preparedness plan serves as a blueprint for a foodservice operation to prepare for potential disruptions related to natural disasters, food recalls, and food defense.

Encumbrances – The amount of money (fund balance) reserved for outstanding purchase orders and unpaid bills. It functions as a fund control device.

Escalator/De-Escalator Clause or Market-Based Pricing – Escalator/de-escalator clause or market-based pricing are predetermined provisions in a contract stipulating specific conditions for an increase or decrease in price.

Ethics – Ethics can be defined as the moral standards individuals use to guide decisions in their personal and professional lives. In the business world, ethical behaviors are practices that promote free and open competition. School nutrition professionals have a responsibility to act ethically in accordance with all Federal, State, and local guidelines.

Execution of Contracts – To execute a contract is to complete and formally sign the legal document. For school nutrition purposes, it is the official signing of the contract by the School Food Authority and the vendor which indicates that the contract has begun (or has been renewed). Before any contract or amendment to a new or existing foodservice management company (FSMC) contract is executed, a State agency must review and approve the contract terms and assure that the SFA has incorporated all State agency required changes into the contract or amendment.

Expenditures – Those allowable costs that can be identified specifically with the production and service of meals to school children.

Extra Foods – A school may offer extra foods, such as grits, ice cream or pudding, which are not creditable. This extra food may be selected by the student in addition to the meal, but may not credit toward the minimum number of meal components/food items a school is required to offer under OVS or that a student must select. However, these extra foods must be included in a nutrient analysis to assess compliance with the weekly dietary specifications (calories, saturated fat, and sodium).

Eye Appeal – The quality of appealing to the eye; attractiveness; beauty.

F.

Feasibility Analysis – A feasibility analysis is an evaluation or analysis that is conducted to assess the potential impact of a proposed project or program. Its purpose is to assist in the decision making process to determine whether to implement the project or program.

Federal Revenue Sources – Payments received from Federal funds for reimbursable meals, afterschool care snacks, suppers, grants, and cash in lieu of commodities (USDA Foods). The value of USDA Foods received is also considered a Federal revenue source.

FEMA – Federal Emergency Management Agency.

Financial Accountability – 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.

Financial Reporting – The means of communicating financial information to users. Examples are the Statement of Activities and the Statement of Net Position.

First-In, First-Out (FIFO) – First-In, First-Out (FIFO) is the process of rotating the older product to the front and the newer items to the back of the shelf. The age of the item is based on the manufacturer's pack date and not the date on the receipt.

Fixed Price (Fee) – A fixed fee is an agreed upon amount of money that is fixed at the inception of a cost-reimbursable contract. In a cost-reimbursable contract, the fixed fee includes the vendor's direct and indirect administrative costs and profit allocable to the contract.

FLSA – Fair Labor Standards Act

Food and Drug Administration (FDA) – An agency in the U.S. Department of Health and Human Services that has responsibility for the safety of food.

Food and Nutrition Service (FNS) – The Food and Nutrition Service (FNS) administers the nutrition assistance programs of the U.S. Department of Agriculture (USDA). The mission of FNS is to provide children and needy families with better access to food and a more healthful diet through its food assistance programs and comprehensive nutrition education efforts.

Food Allergy – An adverse reaction to a food that involves the immune system.

Food Anaphylaxis – A sudden, severe allergic reaction that involves the person's whole body and can result in death.

Food Bars – Schools are encouraged to use food bars and salad bars as a way to offer a wider variety of vegetables and fruits and to lower plate waste. Food and salad bars are permitted with OVS because they offer a lot of variety, which may facilitate students selecting foods they will consume.

Food Biosecurity – The protection of food from bioterrorism. It addresses ways to limit the opportunity for someone to intentionally contaminate food for the purpose of causing harm or death.

Meal Component—Breakfast – A meal component is one of the three food groups that comprise a reimbursable breakfast. The three meal components to be offered to all students at breakfast are: fruits (or vegetables as substitute); grains (with optional meats/meat alternates items allowed); and fluid milk. For the purposes of OVS, a school must offer at least four food items from the three required meal components (grains, fruits, fluid milk) in at least the daily minimum quantities. Under OVS, the student must select three food items, including at least ½ cup of fruits, to have a reimbursable breakfast.

Meal Component—Lunch – Meal component means one of the five food groups that comprise a reimbursable lunch. For OVS, a reimbursable lunch includes the selection of three or more of the components (meats/meat alternates, grains, vegetables, fruits, and fluid milk) and one of the components must be a minimum ½ cup of fruits and/or vegetables. For other components to be credited for OVS, the student must have the minimum daily required serving for each component.

Food Defense – Food defense pertains to the prevention of intentional contamination of food.

Food Intolerance – An adverse reaction to a food caused by toxic, pharmacologic, metabolic, or idiosyncratic reactions to a food or chemical substances in food that usually does not involve the body's immune system.

Food Item—Breakfast – A food item is a specific food offered in a reimbursable breakfast from the three meal components. For the purposes of OVS, a school must offer at least four food items from the three required meal components (fruits, grains, milk). Under OVS, the student must select three food items, including at least ½ cup of fruits or vegetables, to have a reimbursable breakfast. The food items selected may be from any of the required components and must be in the required minimum quantities. Depending on the planned menu, the student may need to select more than one food item to have the minimum quantity needed for a component to be credited.

Food Item—Lunch – A food item is a specific food offered in a reimbursable lunch from the five meal components. For example, a hamburger patty on a bun is one food item with two of the five meal components (meats/meat alternates and grains). Separate ½ cup servings of peaches, applesauce and pears are three food items that, when selected, comprise one component (fruit).

Food Production – The managerial function of converting food items purchased in various states into menu items that are served to a customer.

Food Recall – Food recall is an action by a manufacturer or distributor to remove a food product from the market because it may cause health problems or possible death.

Food Service Management Company (FSMC) – A food service management company (FSMC) is defined as any organization, whether commercial or nonprofit, that contracts with a School Food Authority (SFA) to manage any aspect of the school nutrition program (SNP).

Food Supply Chain – The food supply chain is a group of stakeholders who have specific responsibilities involved in the procurement process. Each stakeholder operates as an independent business and each has specific sustainability goals. The school nutrition food chain includes the SFA staff, the distributor, the manufacturer, and the U.S. Department of Agriculture (USDA).

Food Texture – The feeling of the food in your mouth—not just one thing but lots of different sensations felt all at once.

Forecasting – The process of analyzing current and historical data to determine future trends. An example is monitoring current revenue and expenditures of a school nutrition program and studying trends that will impact both. (Financial Management)

Forecasting – The process of analyzing current and historical data to determine future trends. In the case of school nutrition programs, forecasting involves predicting and estimating the goods, works, and services needed in specified areas for the coming year, and/or assessing needs by reviewing current procurement activities. Forecasting allows for procurement plans to evolve each fiscal year. (Procurement and Inventory Management)

FMLA – Family and Medical Leave Act

Free and Open Competition – Free and open competition means that all suppliers are playing on a level playing field and have the same opportunity to compete. Procurement procedures may never unduly restrict or eliminate competition.

Fund Balance – As reported on the Statement of Net Position: Assets – Liabilities = Fund Balance. Fund balance includes unassigned funds that are available to spend as well as assigned funds designated for encumbrances.

G.

Grade Groups – Schools must plan lunch and breakfast menus using the grade groups K–5, 6–8, and 9–12. These groups reflect predominant school grade configurations and are consistent with the National Academies of Medicine's Dietary Reference Intake (DRI) groupings. Specific amounts of foods and average calories levels are required for a meal to be considered a healthy school meal depending on the grade groups.

Grade Standards – Grade standards are USDA quality standards and are based on measurable attributes that describe the value and utility of the products. U.S. Grade Standards provide a uniform language for describing the quality and condition for meat, poultry, fresh fruits and vegetables, and processed fruits and vegetables. While safety inspections are mandatory, the Federal government does not require that all food products are graded.

Grantees and Subgrantees – A grantee means the government or other legal entity to which a grant is awarded and is accountable for the use of the funds provided. The grantee is the entire legal entity even if only a particular component of the entity is designated in the grant award document. A subgrantee is the government or other legal entity to which a subgrant is awarded and is accountable to the grantee for the use of the funds provided.

Group Buying Service (GBS) – A Group Buying Service (GBS) is a commonly used term to refer to an organization that buys on behalf of other entities in larger quantities. GBS could also refer to a purchasing cooperative, purchasing consortium, group buying/purchasing organization, etc.; a GBS can call itself many different names. A GBS can be for-profit or not-for-profit. It is vital that all procurement transactions be conducted in a manner providing free and open competition. This principle fully applies to purchases made through GBS.

H.

Hazard Analysis Critical Control Point (HACCP) – A specific approach for identifying food safety hazards that involves finding potential food safety issues in your program and implementing preventative measures.

I.

Incentives – Incentives are rewards for commitment.

Indirect Costs – The school nutrition program's share of general school districts' costs that are incurred for common or joint purposes and cannot be readily identified as a direct cost and are generally determined through a mathematical allocation process.

Individualized Education Program (IEP) – The written educational plan for a student with disabilities, developed by a team of professionals (teachers, therapists, etc.) and implemented to provide specially designed instruction and related services.

Institute of Child Nutrition (ICN) – The Institute of Child Nutrition (ICN) is located at The University of Mississippi, Oxford campus. The mission of ICN is to provide information and services that promote the continuous improvement of child nutrition programs.

Inventory – The value of food and supplies on hand, whether at the food preparation site or in a central warehouse or facility, that are being held for future use.

Invitation for Bid (IFB) – An Invitation for Bid (IFB) is a type of solicitation document used in competitive sealed bidding in which the primary consideration is cost; the expectation is that competitive bids will be received and an acceptance (award) will be made to the responsive and responsible vendor/bidder whose bid is lowest in price. An IFB is a formal method of procurement that uses sealed bidding and results in a fixed-price contract with or without adjustment factors. The IFB must be publicly advertised; and bids shall be solicited from an adequate number of known suppliers, providing them with sufficient time to respond prior to the date set for opening the bids. Also, the IFB should describe the minimum standards expected of a responsible vendor/bidder in measurable terms.

J.

Just-in-Time Preparation – Preparing a menu item in small enough amounts so that it will be at its peak of quality when placed on the service line; other terms that mean the same thing are “batch cooking” and “cooking to the line.” Other definition – just-in-time (JIT) is the delivery of food and supplies just in time for food preparation; usually once per week or longer based on the most cost effective delivery size.

L.

Lead Time – Lead time is the amount of time necessary for the distributor to prepare and deliver the product to the district. Generally, the more lead time that can be provide a distributor, the most cost-effective price for the product. A longer lead time may be necessary for special ordered and fresh products.

Less than Arms-Length Transaction – A less than arms-length transaction occurs when a person responsible for making a purchase and appears to have a stake in the outcome is able to control or substantially influence the actions of others. This may include agreements between divisions of an organization; organizations under common control through common officers, directors or members; and an organization and a director or employee of the organization and his immediate family.

Liabilities – The amounts legally owed to others, generally as payment due for goods or services received. Liabilities may be short-term (due and payable in the current accounting period) or long term (payable over a longer period of time). Liabilities incurred in school nutrition program operations are generally short-term (e.g., salaries, wages, and benefits).

M.

Major Life Activities – Activities such as eating, breathing, learning, walking, working, seeing, hearing, and speaking.

Manager Trainee Program – A program for training employees to become future school nutrition managers.

Manufacturers – Manufacturers are the companies responsible for processing raw products, developing new products, and sending finished products to distributors. In some cases, customers are allowed to directly purchase from the manufacturer when volume warrants.

Market Strategy – A well thought-out series of tactics to make a marketing plan more effective.

Marketing – The process of creating, communicating, and delivering value to customers.

Marketing Mix – Refers to the principles of marketing used to influence a target audience.

Marketing Plan – A written plan of an organized approach to change, with goals and objectives identified, and means of accomplishing goals described.

Material Change – A material change is a change made to a contract after the contract has been awarded that alters the terms and conditions of the contract substantially enough, that, had other respondents (vendor/bidder) known of these changes in advance, they may have bid differently and more competitively.

Meal Equivalent – Conversion of different meal services – snacks, breakfast, nonprogram food sales, suppers, and lunch – to a meal equivalent. All reimbursable lunches and suppers served to children and full paid adult lunches are considered to be one meal equivalent. In some state agencies, adult lunches may be recorded as nonprogram food sales. Merchandising- Any practice that contributes to the sale of products to a retail consumer.

Meals Per Labor Hour – The most common measure of productivity in school nutrition, calculated by dividing the number of meal equivalents produced and served in a day by the number of paid labor hours.

Measurable Goals – Answers questions such as: How much? How many? How will I know when it is accomplished?

Merchandising – As commonly used in marketing, means maximizing merchandise sales using product selection, product design, product packaging, product pricing, and product display that stimulates consumers to spend more.

N.

National School Lunch Program (NSLP) – The National School Lunch Program is a federally assisted meal program operating in over 100,000 public and nonprofit private schools and residential child care institutions. In 1998, Congress expanded the National School Lunch Program to include reimbursement for snacks served to children in afterschool educational and enrichment programs to include children through 18 years of age. The USDA Food and Nutrition Service administers the program at the Federal level. At the State level, the National School Lunch Program is usually administered by State education agencies, which operate the program through agreements with school food authorities.

Noncompetitive Proposal – Noncompetitive proposal is a procurement method used when competition is deemed inadequate. Procurement by noncompetitive proposals may be used only when the award of a contract is infeasible under small purchase procedures, sealed bids, or competitive proposals, and one of the following circumstances applies.

- The item is available only from a single source.
- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation.
- The awarding agency authorizes noncompetitive proposals.
- After solicitation of a number of sources, competition is determined inadequate.

Negotiations must include both price and terms using the same procedures that would be followed for competitive proposals.

Nonprofit School Nutrition Account – The nonprofit school nutrition account is the restricted account in which all of the revenue from the school nutrition operations conducted by the School Food Authority principally for the benefit of school children is retained. This account is used only for the operation or improvement of the nonprofit school nutrition operation. Additionally, any money earned from the school nutrition operation can be used only to operate or improve the program.

Nonspendable Assets – A category of program assets not in spendable forms, e.g., inventories, furniture, and equipment, less depreciation.

Non-Bid Item – A non-bid item is a food or service good that is not part of the specifications for the bid.

Nutrition Accountability – Demonstrating responsibility for and ensuring that applicable nutrition guidelines, policies, standards, and best practices are a priority in implementing the school nutrition program.

Nutrition Integrity – 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).

O.

Offer Versus Serve (OVS) – Offer Versus Serve or OVS is a concept that applies to menu planning and the meal service. OVS allows students to decline some of the food offered in a reimbursable lunch or breakfast. At the senior high school level, OVS is required at lunch unless the school or SFA demonstrates to the State agency that their system does not accommodate OVS. The goals of OVS are to reduce food waste and to permit students to choose the foods they want to eat. OVS is optional for SFAs providing meals through the at-risk afterschool meals component of the Child and Adult Care Food Program. OVS is also optional for summer meals offered by SFAs through the Summer Food Service Program. When used for these programs, SFAs must follow the applicable requirements outlined in this guidance. OVS cannot be used for snacks in any program since the meal patterns for snack service do not include enough food for a child to decline food and have a reimbursement snack.

Offeror – An offeror is the entity that responds to a Request for Proposal (RFP) for the purpose of providing a product or service. An offeror is also referred to as a respondent or vendor.

Office of Management and Budget (OMB) – The Office of Management and Budget (OMB) issues broad, government-wide financial requirements that affect the school nutrition programs (SNPs) and OMB circulars that explain these financial requirements.

Online Bidding Service – An online bidding service is a website in which a purchasing cooperative can make a solicitation through the Internet.

Operating Ratios – An analysis of financial data in terms of relationships to measure the efficiency of the operation of the school nutrition program. An expenditure being a percentage of revenue is an example of an operating ratio.

Ordering – Ordering is the process of communicating the name of the product, the product specifications, the code numbers, the quantities, and the delivery date and time for a product to be delivered by the vendor.

Order Placement Calendar – An order placement calendar is a planning tool that identifies when to order food and supplies for the school nutrition operation. The calendar includes the name of the vendor, the menu period dates, the date the item is to be served, the order date, and the required delivery date. Generally the calendar is developed annually and is updated accordingly as items are added or deleted from the menu.

Orientation – The process by which newly hired employees are introduced to school nutrition.

OSHA – Occupational Safety and Health Administration is the Federal agency whose goal is protecting the health and well-being of the nation's workers.

P.

Par Stock – Par stock is a predetermined inventory quantity for a particular item and serves as an indicator on when to reorder the product.

Peer Interview Process – A group interview technique that uses a team of employees to interview and rate the applicant.

Performance-Funded Grants – A grant means an award of financial assistance, including cooperative agreements, in the form of money, or property in lieu of money, by the Federal government to an eligible grantee. A local program operator's entitlement to funding from its administering agency is generally a function of the categories and types of service provided. Therefore, because reimbursement in the school nutrition programs (SNPs) is based on the number of meals served, the programs are said to be performance funded.

Performance Appraisal – A method by which the job performance of an employee is evaluated.

Performance Standards – Written definitions that describe acceptable job performance.

Person in Charge (PIC) – The individual who is responsible for the foodservice operation, this individual is on-site, and one person would be designated per shift.

Prader-Willi Syndrome – The Prader-Willi infant has very low muscle tone, difficulty in sucking and swallowing, and may have failure to thrive; most have an overwhelming appetite and lack ability to know when they are full.

Pre-Packaged Meals (Bagged or “Grab and Go” Meals) – Pre-packaged meals are allowed at all levels. For senior high schools, if this is the only system available for the NSLP, OVS for all or some components must be implemented unless a school was approved by the State agency to not implement OVS. Even with such approval, schools are encouraged to have some meal components/food items with choices and/or the option to decline, such as milk. If these meals are offered as part of breakfast in the classroom, field trips, or for students leaving the campus for work study, OVS is not required, even at the senior high level with State agency approval.

Primary Customer – In school nutrition, the primary customer is any student enrolled in the school district that is eligible for the reimbursable school meals programs.

Procedure – Identifies the steps and techniques needed for combining and preparing or finishing a product.

Procurement – Procurement is a multi-step process for obtaining the most responsive goods, products, and/or services at the best possible price. The steps in this process are planning, writing specifications, advertising the procurement, awarding the contract, and managing the contract.

Production and Menu Records – Schools or SFAs, as applicable, must keep production and menu records for the meals they produce. These records must show how the meals offered contribute to the required meal components and food quantities for each age/grade group every day.

Production Records – A record which contains information that communicates to the staff the food items and amounts to prepare and serve.

Production Schedules – Organized plans for the accomplishment of all tasks necessary to produce the menu.

Professional Integrity – Acting in agreement with or being faithful to the core values of one's profession.

Program Access Accountability – 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.

Progressive Discipline – A system of discipline in which penalties increase upon repeated occurrences; usual stages are counseling or verbal warning, written warning, suspension or demotion, and termination.

Proprietary Products – Proprietary products are manufactured products ordered strictly for a particular program, or are unique to a manufacturer.

Purchasing Association – A purchasing association is the relationship between a manufacturer, a distributor, and a cooperative purchasing group.

Q.

Quality Food Standards – The quality characteristics of food that are acceptable to consumers—includes external factors such as appearance (size, shape, color, gloss, and consistency), texture, and flavor; and internal factors such as safety aspects.

Quality Standards – Standards established to evaluate the appearance, flavor, texture, and service temperature of food items in order to ensure characteristics of high quality products.

R.

Rebate – Money received from a company as an incentive to use a product. If the rebate is received during the year in which the food is purchased, it is recorded as a reduction to food costs. Rebates from the prior school year are recorded as revenue (Financial Management).

Rebates are Monetary Returns – The regulations require vendors under cost-reimbursable contracts to provide sufficient information to permit the SFA to identify allowable and unallowable costs, as well as the amount of all such discounts, rebates, and other applicable credits on invoices and bills presented for payment to the SFA. [7 CFR 210.21(f), 215.14a (d) and 220.16(e).]

Recipient Agency (RA) Agreement – Under a Recipient Agency (RA) agreement, the RA, school, or other eligible agency enters into an agreement with the processor. This kind of arrangement requires the approval of the distributing agency. Once approved, the RA may purchase end products from that processor. A RA agreement should be used after the agency has completed its procurement process.

Recruiting – The process of finding eligible and qualified persons to hire.

Request for Proposal (RFP) – A Request for Proposal (RFP) is a type of solicitation document used for the formal procurement method of competitive proposals. The RFP identifies the goods and services needed and all significant evaluation factors. The RFP is publicized and is used to solicit proposals from a number of sources. Negotiations are conducted with more than one of the sources submitting proposals, and either a fixed-price or cost-reimbursable type contract is awarded. Competitive proposals may be used if conditions are not appropriate for the use of competitive sealed bids.

Respondent – A respondent, also referred to as a vendor/bidder, is a commercial enterprise, a public or nonprofit private organization, or an individual that responds to a solicitation and potentially enters into a contract with the SFA. To be considered responsible, a vendor must be capable of performing successfully under the terms and conditions of the contract.

Responsive and Responsible Respondent (Vendor/Bidder) – To be considered responsive, a respondent must submit a response to the Invitation for Bid (IFB) or Request for Proposal (RFP) that conforms to all material terms and conditions of the solicitation. To be considered responsible, a respondent must be capable of performing successfully under the terms and conditions of the contract. In order to be awarded a contract, a respondent must be responsive and responsible.

Revenues (Nonprofit School Nutrition Operations) – Revenue, when applied to nonprofit school nutrition operations, means all monies received or accrued by accruing to the nonprofit school nutrition program (SNP) in accordance with the State agency's established accounting system, including but not limited to, children's and adults' payments, earnings on investments, other local revenues, state revenues, and Federal cash reimbursements. Revenues received by the nonprofit school nutrition account are to be used only for the operation or improvement of such programs.

Run Number – The production run number is the code that identifies the production plant, the date, the shift, and the production line that manufactured the product. This number is not printed on the label but rather stamped on the case at the time the product is manufactured.

S.

Safety Data Sheet (SDS) – Documents produced by a chemical manufacturer that contain information about the chemical such as physical, health, and environmental health hazards; protective measures; and safety precautions for handling, storing, and transporting the chemical.

School Breakfast Program (SBP) – The School Breakfast Program is a federally assisted meal program operating in public and nonprofit private schools and residential child care institutions. It began as a pilot project in 1966, and was made permanent in 1975. The School Breakfast Program is administered at the Federal level by the Food and Nutrition Service. At the State level, the program is usually administered by State education agencies, which operate the program through agreements with local school food authorities in more than 89,000 schools and institutions.

School Day – The school day is defined as the midnight before to 30 minutes after the end of the instructional day. If such programs are operated in the school during the school day, or if afterschool snacks or meals are provided within the 30 minute window after the end of the instructional day, any other food available for sale to students at that time must comply with the Smart Snacks requirements.

School Food Authority (SFA) – The governing body responsible for the administration of one or more schools and has legal authority to operate the National School Lunch Program and/or School Breakfast Program.

School Nutrition Association (SNA) – Recognized as the authority on school nutrition, the School Nutrition Association (SNA) has been advancing the availability, quality and acceptance of school nutrition programs as an integral part of education since 1946. The School Nutrition Association is the only professional association dedicated solely to the support and well being of school nutrition professionals in advancing good nutrition for all children.

School Nutrition Procurement Team – The School Nutrition Procurement Team is a group of internal stakeholders representing the school district's best interest. The team may include: the school nutrition director; the managers; the school nutrition staff; the business manager; a procurement officer; and the school board members.

School Nutrition Programs (SNP) include – School Breakfast Program (SBP); National School Lunch Program (NSLP); After School Snack Program (ASSP); Fresh Fruit and Vegetable Program (FFVP); Special Milk Program; Seamless Summer Option (SSO); and Summer Food Service Program (SFSP).

School Week – School week means the period of time used to determine compliance with the meal requirements. The period shall be a normal school week of five consecutive days. For schools with occasional decreases in the school week length due to holidays, for example, the menus do not have to be adjusted, but menu planners must plan their menus in a way that is consistent with the intent of the meal patterns. Planners should make sure they do not consistently fail to offer certain vegetable subgroups or offer grains and meats/meat alternates in portions that would exceed the weekly requirements.

School Wellness Accountability – 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.

Secondary Customer – Secondary customers in the school nutrition program are the school district's faculty, administrators, support staff, and guests that are invited to eat at the school. Meals served to secondary customers are not eligible for reimbursement.

Small Purchase Procedures – Small purchase procedures, also known as informal procurement, are those relatively simple and informal procurement methods for securing services, supplies, or property that may be used when the anticipated acquisition will fall below the small purchase threshold. The small purchase threshold has been changed from \$100,000 to \$150,000. State and local regulations often set lower small purchase thresholds which are more restrictive than the Federal level. In applying the small purchase threshold, the School Food Authority must adhere to the most restrictive, lowest limit set. If small purchase procedures are used, price or rate quotations shall be obtained from an adequate number of qualified sources.

Smart Snacks – The Healthy, Hunger-Free Kids Act of 2010 directed the USDA to establish nutrition standards for all foods and beverages sold to students in school during the school day. Please refer to guidance on the Smart Snacks: (fns.usda.gov/cn/smart-snacks-school).

Social Marketing – A process for influencing human behavior on a large scale; using marketing principles for the purpose of societal benefit rather than for commercial profit.

Sole Source Procurement – Sole source procurements in the school nutrition program (SNP) occur only when the goods or services are available from only one manufacturer and/or through only one distributor or supplier. Sole source describes a condition of the procurement environment. In a true sole source situation, conducting a traditional solicitation (sealed bid, competitive proposal, or small purchase) is a meaningless act because the element of competition will not exist. When faced with an actual sole source situation, a School Food Authority must first obtain State agency approval, and then go directly to the one source of supply to negotiate terms, conditions, and prices.

Solicitations – A solicitation is a document used by the School Food Authority to acquire goods, products, and/or services. Solicitations must incorporate a clear and accurate description of the technical requirements for the material, product, and/or service to be procured. Solicitations must also identify all the requirements which the respondents (offerors) must fulfill and all other factors to be used in evaluating the solicitations or proposals.

Solicitation Protest Procedures – An interested party may protest a solicitation or other request for offers for a contract for the procurement of property or services; the cancellation of such a solicitation or other request; an award or proposed award of such a contract; and a termination of such a contract, if the protest alleges that the termination was based on improprieties in the award of the contract. Grantees and subgrantees must have protest procedures in place to handle and resolve disputes relating to their procurements and shall in all instances disclose information regarding the protest to the awarding agency. Food and Nutrition Service (FNS) will accept a solicitation protest from a protestor only if the following conditions have been met.

- The contract was made in connection with the School Nutrition Program (SNP).
- The protestor has exhausted all administrative remedies with the grantee and subgrantee before pursuing the protest with FNS.
- Violations of Federal law or regulations and the standards of this section exist (violations of State or local law will be under the jurisdiction of State or local authorities).
- Violation of a grantee's or subgrantee's protest procedures exists for failure to review a complaint or protest. Protests received by the Federal agency other than those specified above will be referred to the grantee or subgrantee.

Solicitation Template – A solicitation template, sometimes referred to as a boilerplate, contains standard language included in the solicitation documents. The template should be reviewed by legal counsel for compliance to Federal, State, and local requirements.

Specification – A specification is a concise statement of a set of requirements to be satisfied by a product, material, and/or process.

Specification Sheets – Specification sheets are written materials prepared by manufacturers to describe their equipment and document important product information.

Spina Bifida – A neural tube defect; these children are born with a lesion in the spinal column which can result in problems related to walking and elimination.

Stakeholder – Individuals or groups that have a strong interest in the success of the school nutrition program's services.

Standard Operating Procedure (SOP) – Written best practices and procedures for producing safe food that address basic cleaning and sanitation programs and each step in the foodservice process (purchasing, receiving, storing, preparing, cooking, serving and holding, cooling, reheating, and transporting).

Standardized Recipe – A standardized recipe is a recipe that has been tried, adapted, and retried several times for use by a given school nutrition operation. The recipe has been found to produce the same good results and yield every time when the exact procedures are used with the same type of equipment and the same quantity and quality of ingredients.

Standards of Identity (SOIs) – Standards of Identity (SOIs) for foods are Federal requirements that define what a food product is, its name, and the ingredients that must or may be used in the manufacture of that food. SOIs protect consumers by ensuring labels accurately describe the products contained within the package.

Statement of Activities – The financial report of all revenues and expenditures earned and expended for a given period of time. The report tells program administrators whether the school nutrition program is operating with a gain or at a loss for the reporting period. Formerly referred to as the Statement of Revenues and Expenditures.

Statement of Net Position – A financial statement that reflects the financial position of the operation on any given day; also known as a Balance Sheet. Formerly referred to as the Statement of Net Assets.

State Agency (SA) – The State agency (SA) is the agency in the state responsible for administering the Child Nutrition Programs.

Stock Keeping Units (SKUs) – A stock keeping unit is a unique identifier for each unit of product. The SKU is usually the product code number.

T.

Taste Test – A tool used to gather information about the flavor of a food or product.

Time and Temperature Control for Safety Foods (TCS) – Foods that require control of time and temperature to limit pathogenic microorganism growth or toxin formation.

Transparent – Transparent means that everything done by the SFA must be clear, forthright, and out in the open.

Transportation – Transportation is the process of moving food and non-food products from one site to another.

U.

Unassigned – Funds that have not been allocated and are available for new expenditures not already encumbered. Formerly referred to as Unreserved/Undesignated.

United States Department of Agriculture (USDA) – The USDA is the Federal department responsible for administration of the nation's child nutrition and USDA Foods distribution programs. The Food Distribution Division of USDA's Food and Nutrition Service (FNS) is responsible for coordinating the distribution of USDA Foods to State agencies that oversee the SNP in their states. The FNS administers the nutrition assistance programs of the USDA. The mission of FNS is to provide children and needy families with better access to food and a more healthful diet through its food assistance programs and comprehensive nutrition education efforts.

Unit Pricing – School meals must be priced (for the paid and reduced price categories) as a unit. This means that one price is established for a complete reimbursable meal in the paid meal category and one price is established for a complete reimbursable meal in the reduced price meal category. The SFA may set different unit prices for various combinations of foods offered. For example, if students are offered reimbursable meals centered around a variety of entrées, such as a hamburger, chef's salad, lasagna or a turkey sandwich, the SFA may set four unit prices depending on which entrée is selected. Students who are eligible for reduced price meals must have access to all reimbursable meal combinations. If different unit prices are charged for menu options students who are eligible for reduced price meals must pay only the reduced rate regardless of the unit prices for paid lunches.

USDA Foods – USDA Foods are available to any school that participates in a USDA school nutrition program. USDA Foods account for 15% to 20% of the foods in SNPs and are 100% American grown.

V.

Value-Analysis Process – A value-analysis process is a study of the total cost and total savings to the buyer on each purchase to determine if any specific cost is high for the value received.

Velocity Report – A velocity report provides the quantity, the date of purchase, and other valuable information. The report can serve as a tool for the SFA staff when forecasting the needs of the district and documenting solicitation integrity. Upon request, the distributor can generate a velocity report for products purchased during a specific time period.

Vendor – A vendor/bidder, also referred to as a respondent, is a commercial enterprise, public or nonprofit private organization, or individual that enters into a contract with a School Food Authority.

W.

Workers' Compensation – Insurance that provides medical care and compensation for employees injured on the job.

504 Accommodation Plan – A planning document used in schools for children who require health related services (including modified meals) but who are not enrolled in a special education program; mandated by the Rehabilitation Act of 1973.

7 CFR Parts 3018 – Government wide Debarment and Suspension-Nonprocurement USDA regulations include 7 CFR Parts 3018 (New Restrictions on Lobbying) which explains limitations regarding lobbying activities.

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