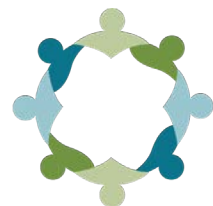
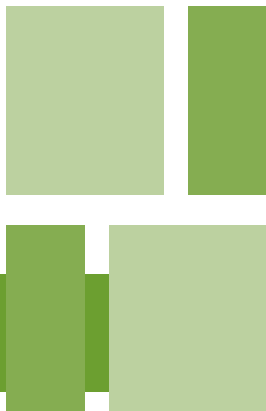
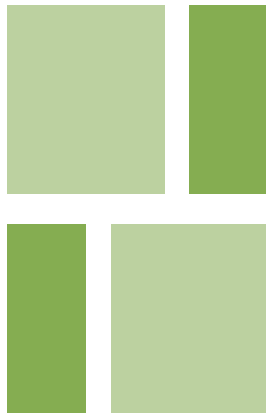




INSTITUTE OF
child nutrition
RESOURCES • TRAINING • RESEARCH



Introduction to School Nutrition Leadership



INTRODUCTION TO
SCHOOL NUTRITION
LEADERSHIP

Instructor's Manual

Introduction to School Nutrition Leadership

Instructor's Manual

Time: 30.5 hours

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Key Areas: 1, 2, 3, 4

USDA Professional Standards Codes: 1000, 2000, 3000, 4000

2022

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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Office of the Assistant Secretary for Civil Rights
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Washington, D.C. 20250-9410;
- (2) Fax: (202) 690-7442; or
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08/17/2022

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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*. This is a five-day training intended for new and aspiring school nutrition program directors with five years' or less experience. Lessons provide an overview of school nutrition programs, define the role and responsibilities of a director, and review the relationship between local policies and State/Federal regulations. The course has been developed to encourage open-group discussion so participants can be actively involved in learning the skills and knowledge needed for the daily operation of school nutrition programs. Although geared to participants with five years' or fewer experience, the audience may include more experienced school nutrition professionals, college students, State agency personnel, and others affiliated with school nutrition programs.

The entire training is 30.5 hours, and the course content is divided into five days of training. An *Introduction to School Nutrition Leadership* weekly schedule is provided as a separate handout. This handout notes the topics to be covered each day, time allowed for each topic, and continuing education hours.

Introduction to School Nutrition Leadership topics include:

- Effective Goal Setting Using SMART Goals
- Program Accountability, Integrity, and the Role of the Directors
- Reimbursable School Meals
- Meal Accommodations
- Food Production and Operation Management
- Procurement and Inventory Management
- Customer Experience, Merchandising, and Food Preparation
- Marketing
- Key Performance Indicators
- Human Resource Management
- Food Safety
- Workplace Safety and Emergency Preparedness

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	✓
<p>Reserve equipment and gather supplies as needed for use on the day of class (6 weeks prior).</p> <p>Instructor's Manual Roster of participants attending for instructor</p> <p>Participant sign-in sheets</p> <p>Pre-/Post-Assessment</p> <p>List of equipment and supplies needed</p> <p>Microphone (preferably wireless)</p> <p>Computer to present slides</p> <p>Projector and screen</p> <p>Wireless presenter device and laser pointer</p> <p>Chart paper (self-adhesive strip sheets)</p> <p>Painter's tape (do not use masking tape)</p> <p>Markers (chart paper)</p> <p>Pens, pencils, note paper, highlighters, self-adhesive notes, page markers, index cards (each table)</p> <p>Ground Rules</p> <p>Name tags and table tents</p>	Instructor		
<p><i>Basics at a Glance</i> poster</p> <p>Policy Memo SP 59-2016 <i>Modifications to Accommodate Disabilities in the School Meal Programs</i></p>			

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*. This is a five-day training intended for new and aspiring school nutrition program directors. There may be other professionals in the room as well, which will only enhance the training. The entire training is 30.5 hours, and the course content is divided over five days. An *Introduction to School Nutrition Leadership* weekly schedule is provided as a separate handout. This handout notes the topics to be covered each day, time allowed for each topic, and continuing education hours. Lessons provide an overview of 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 operation.

This training provides an amazing overview of what it takes to be successful at your job. Key terms for each lesson are available in the back of the Participant's Workbook. We encourage you to ask questions and network with your peers. At the end of each lesson, there will be time to develop SMART goals you can apply when you return to your district.

There are a few "housekeeping" items to review.

- The restrooms and water fountain are located (point out the location).
- Be sure you signed the sign-in sheets.
- I will try to answer questions throughout the training; however, sometimes a question requires research or a longer answer than time allows. Because all of your questions are important, a "Bike Rack" has been posted. Write your question on a sticky note and post it to the Bike Rack.

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.

Effective Goal Setting Using SMART Goals for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 hour



Key Area: 4 (Marketing and Communications)

USDA Professional Standards Code: 4100

2022

Lesson Objectives

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

- Identify personal and/or team strengths.
- Identify personal and/or team weaknesses.
- Identify challenges and/or issues preventing progress in specific best practice areas.
- Define mission.
- Explain the purpose of a mission statement.
- Identify clear, concise mission statements.
- Develop a mission statement.
- List the terms each letter of SMART represents.
- Explain each characteristic of a SMART goal.
- Critique example goals to determine if they meet the SMART goal criteria.
- Use a template to ensure personal/program performance goals are developed using SMART characteristics.
- Develop SMART goals that meet the SMART characteristics.
- Explain at least three benefits of using SMART goals.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objectives: <ul style="list-style-type: none"> • Identify personal and/or team strengths. • Identify personal and/or team weaknesses. • Identify challenges and/or issues preventing progress in specific best practice areas. 			
20 minutes	<ul style="list-style-type: none"> • Lesson Objectives • Personal Assessment 	<ul style="list-style-type: none"> • Review Objectives • Personal Assessment 	Participant's Workbook
Objectives: <ul style="list-style-type: none"> • Define mission. • Explain the purpose of a mission statement. • Identify clear, concise mission statements. • Develop a mission statement. 			
25 minutes	Mission Statement	<ul style="list-style-type: none"> • You Decide • Write Your Mission 	Participant's Workbook
Objectives: <ul style="list-style-type: none"> • List the terms each letter of SMART represents. • Explain each characteristic of a SMART goal. • Critique example goals to determine if they meet the SMART goal criteria. 			
10 minutes	What Is a SMART Goal?		Participant's Workbook
Objectives: <ul style="list-style-type: none"> • Use a template to ensure personal/program performance goals are developed using SMART characteristics. • Develop SMART goals that meet the SMART characteristics. • Explain at least three benefits of using SMART goals. 			
5 minutes	Develop a SMART Goal	Let's Set a SMART Goal	Participant's Workbook
Total: 1 hour			

Effective Goal Setting Using SMART Goals

SHOW SLIDE: Effective Goal Setting Using SMART Goals

SAY: Welcome to Effective Goal Setting Using SMART Goals. The purpose of this lesson is to focus on setting SMART goals and highlight how this method will help establish a defined path toward an objective. By learning what the acronym, SMART, stands for, you will identify the key components to writing concise, achievable goals. We all want to work smarter, not harder. First, let's begin by learning how to clarify your ideas and focus your efforts. Without a clearly defined path, we are simply spinning our wheels, which will ultimately result in little to no progress or improvement in our jobs or productivity levels.

To paraphrase the Cheshire Cat from Lewis Carroll's *Alice's Adventures in Wonderland*, "If you don't know where you're going, any road will get you there." A clearly defined path for success cannot be planned if you don't know where the starting point is.

SHOW SLIDES: Lesson Objectives and Lesson Objectives, continued

DO: Review the objectives for this lesson.

Objectives:

- Identify personal and/or team strengths.
- Identify personal and/or team weaknesses.
- Identify challenges and/or issues preventing progress in specific best practice areas.

SHOW SLIDE: Activity: Personal Assessment

ACTIVITY: Personal Assessment

Materials: Personal Assessment worksheet

Time: 10 minutes

Instructions: Have participants write down their answers to the **Personal Assessment** worksheet.

SAY: In order to create SMART goals you should identify your personal and your team's strengths, weaknesses and challenges. Take about 10 minutes to answer the question on the **Personal Assessment** worksheet.

SAY: Now that you have identified your personal and/or teams strengths, weaknesses and challenges, we can discuss the importance of and steps for establishing a mission statement.

SHOW SLIDE: Mission

Objectives:

- Define mission.
- Explain the purpose of a mission statement.
- Identify clear, concise mission statements.

SAY: When developing missions, goals, and/or action plans, the first step is to identify the challenges your school nutrition program is facing. This is difficult to accomplish if you do not know your current status. Your personal assessment should have helped you with that process as you identified your strengths and weaknesses. Now, you are ready to set a mission. This is the standard by which you evaluate and direct everything. A mission is your purpose, your reason, and your operating principle. Consider this example from a wildly popular internet search engine ... “to organize the world’s information and make it universally accessible and useful.” This one statement guides everything the company does and allows them to work and make decisions based on the end result that they want to achieve. When you know what you want to achieve, you can make decisions more clearly and can more easily let go of things that may sidetrack you.

As a leader, when writing a mission, it should be a clear, concise statement that answers four essential questions:

1. What do we do?
2. How do we do it?
3. For whom do we do it?
4. What value are we bringing?

SHOW SLIDE: Activity: You Decide

ACTIVITY: You Decide

Materials: You Decide handout

Time: 10 minutes

Instructions: Have participants work as a team and decide which mission statements answer the four questions in a clear concise statement using the **You Decide** handout.

SAY: By examining sample mission statements, it may help you develop one specific to you or your team more easily. Let’s look at a few examples as a team from some current Forbes 500 companies, and YOU DECIDE which ones answer the four previous questions in a clear, concise statement. There are no right or wrong answers.

DO: Divide participants into groups.

You Decide

Instructions: Working as a team use the following questions to decide if the mission statement is clear and concise. There are no right or wrong answers.

Questions

- What do we do?
 - How do we do it?
 - Whom do we do it for?
 - What value are we bringing?
-
1. "To provide personal vehicle owners and enthusiasts with the vehicle related products and knowledge that fulfill their wants and needs at the right price. Our friendly, knowledgeable and professional staff will help inspire, educate and problem-solve for our customers."
 2. "To enable individuals and businesses to manage financial risk."
 3. "We are a global family with a proud heritage passionately committed to providing mobility for people around the world."
 4. "To operate the best specialty retail business in America, regardless of the product we sell ..."
 5. "To discover, develop, and deliver innovative medicines that help patients prevail over serious diseases."
 6. "Undisputed marketplace leadership."
 7. "To nourish and delight everyone we serve."
 8. "To unlock the potential of nature to improve the quality of life."
 9. "People love our clothes and trust our company. We will market the most appealing and widely worn casual clothing in the world. We will clothe the world."
 10. "We work to help people and businesses throughout the world realize their full potential."

DO: After 5 minutes read each question and ask participants which mission statements were clear and concise.

SHOW SLIDE: *Activity: Write Your Mission*

ACTIVITY: Write Your Mission

Materials: Write Your Mission worksheet

Time: 15 minutes

Instructions: Have participants answer the questions on the **Write Your Mission** worksheet in Participant's Workbook.

SAY: Now that you have identified clear, concise mission statements, it is time to create your own. For the purposes of this lesson, let's focus on writing a personal mission statement. Although slightly different from writing one with your team, the basic idea is the same—to help you get where you want to go. Take about 15 minutes and answer the questions on the **Write Your Mission** worksheet in the Participant's Workbook.

DO: Allow participants 15 minutes to answer the questions on the **Write Your Mission** worksheet.

Write Your Mission

Instructions: Answer the following questions. These questions will help you create a personal mission statement.

#1 – Discover Your Inspiration

Think about a person you admire or gain inspiration from. Consider what makes that person important to you. Reflect on these four areas to identify specific characteristics that person(s) has.

- Personality traits
- Skills
- Achievements
- Character

#2 – Who Are You?

Now, think about yourself. How do people describe you? What makes you, you? What do you want people to think of you? Consider these same four areas as before to identify who you are and who you want to become.

- Personality traits
- Skills
- Achievements
- Character

Write Your Mission, continued

#3 – Purpose

What do you consider your purpose in life? What were you born to do?

#4 – Strengths and Aptitudes

Brag on yourself. What are you good at doing? What makes you happy and brings you joy? This list is about what gives your life purpose.

#5 – Awareness

Ask yourself what is important in life, in the world around you, in your job, and in society. If money was not a concern, what would you be doing? What are your hopes and dreams? Your *pie in the sky*?

Write Your Mission, continued

Create Your Mission

Think back over all of the things you just wrote in Steps #1–5. Consider what you want to serve as your guide (for your thoughts, your actions, and your everyday decisions). Be positive. Be concise. Be clear.

Keep in mind all the examples you have previously seen in this lesson and create your mission statement. Be sure to stay true to who you are, and what you want to achieve.

What is your mission?

SHOW SLIDE: What Is a SMART Goal?**Objectives:**

- List the terms each letter of SMART represents.
- Explain each characteristic of a SMART goal.
- Critique example goals to determine if they meet the SMART goal criteria.

SAY: With a clear and concise mission in place, let's focus on the steps that we need to take to help fulfill the lesson. To do this, we are going to set SMART goals.

The idea of SMART goals has been around since the late 1900s when educators and experts like Peter Drucker, Robert Rubin, and Paul J. Meyer began using the criteria to explain an effective way to achieve objectives and goals.

To set goals that are clear and can be accomplished, they should be written based on the SMART criteria.

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-Bound

Although you may find several variances of the criteria, the characteristics are always the same when related to goal setting.

SHOW SLIDE: Develop a SMART Goal**Objectives:**

- Use a template to ensure personal/program performance goals are developed using SMART characteristics.
- Develop SMART goals that meet the SMART characteristics.
- Explain at least three benefits of using SMART goals.

SAY: Now that we have covered the characteristics of a SMART goal and have identified goals that meet the characteristics, it is time to develop your own SMART goals.

As a reminder, to set goals that are clear and concise, we should write them based on the SMART characteristics.

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-Bound

To accomplish this, we will use a development worksheet that walks us step-by-step through the process. Keeping in mind that your goals should be RELEVANT, you first need to decide which area(s) you will target for improvement.

You completed your personal assessment and a mission statement. Both of these should help guide your decision.

ASK: For example, if you identified procurement as a strength and your mission statement focuses on customer service, it would not be a SMART goal if you chose to set a goal to increase participation. Why?

FEEDBACK:

It would not be a SMART goal because procurement was identified as a strength, and the mission statement focused on customer service. A SMART goal must be RELEVANT so it should be based on a weakness.

Remember the **R** in SMART stands for RELEVANT. To qualify as a SMART goal, it must be based on forecasted needs.

SHOW SLIDE: *Activity: Let's Set a SMART Goal*

ACTIVITY: Let's Set a SMART Goal

Materials: SMART Goal Development Process handout and Let's Set a SMART Goal worksheet

Time: 15 minutes

Instructions: As a group, review each step of the SMART Goal Development Process handout. After review, have each participant use the Let's Set a SMART Goal worksheet to create a SMART goal for what they would like to accomplish after this course.

SAY: We will review each step of the SMART Goal Development Process handout as a group. After review, use the Let's Set a Smart Goal worksheet to create a SMART goal for what you would like to learn at the end of this course.

SMART Goal Development Process

Target

Let's start by setting your target. Your target for this activity is setting a goal for what they would like to accomplish after this course.

The Current Picture

Once you have identified the target area, you are ready to start developing your first goal! Increasing participation will be used as the example to help you work through this process.

Think about the current status of your program in relation to the area of weakness you have chosen. Ask yourself, "What key issues need to be addressed?"

In the example, there are three key issues:

1. The students at Park Street Middle School do not like the brand of whole grain-rich pasta that is currently being served.
2. There is a 25% decrease in the number of reimbursable meals sold on days when spaghetti is served as the entrée.
3. We are having difficulty finding a whole grain-rich pasta that meets the meal pattern standards.

What Do You Want?

Thinking about the key issues you just identified, start brainstorming what it is you want to see as an outcome. What type of change would help to address the issue(s)?

SMART Goal Development Process, continued

There are NO right or wrong answers at this point. Dream big, and generate as many ideas as possible. These ideas are all possible goals.

For our example, here are a few ideas we might consider:

1. Remove the pasta from the menu
2. Find a different cooking method
3. Conduct taste tests with students and staff
4. Employee training
5. More nutrition education with students
6. Model behavior by having teachers, student groups (i.e., athletes), administrators, and parents promote food choices
7. Try, try, try, and try again!

What Do You REALLY Want?

After dreaming of all the possible outcomes you would like to see, ask yourself, “Which one(s) is/are the most realistic based on the resources you have and your program’s current situation?”

Drill down and decide what is it that you REALLY want to achieve. From all of your brainstorming ideas, pick the best goal and outcome.

In our example situation, the best goal and outcome would be to taste test different brands of whole grain-rich pasta that the students liked.

SMART Characteristics

Now that you have identified the best goal and outcome, it is time to develop the goal into a more specific and concise one using the SMART characteristics.

Use the questions on the **Let's Set a SMART Goal** worksheet as a guide to ensure each characteristic category is addressed in your goal.

Let's look at the example again. The best goal and outcome identified was to taste test different brands of whole grain-rich pasta that the students liked.

SMART Goal Development Process, continued

Using the *Let's Set a SMART Goal Worksheet*

The best goal and outcome identified was to taste test different brands of whole grain-rich pasta that the kids liked.

We will now walk through each characteristic category of SMART goals.

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 are not 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.

SAMPLE SMART GOAL

SAY:

SPECIFIC: 7th and 8th grade students at Park Hill Middle School will taste test three different whole grain-rich pastas.

MEASURABLE: 65% of the students will prefer the selected whole grain-rich pastas.

ACHIEVABLE: Yes, it is.

RELEVANT: Yes, it relates directly back to the weaknesses and mission statement.

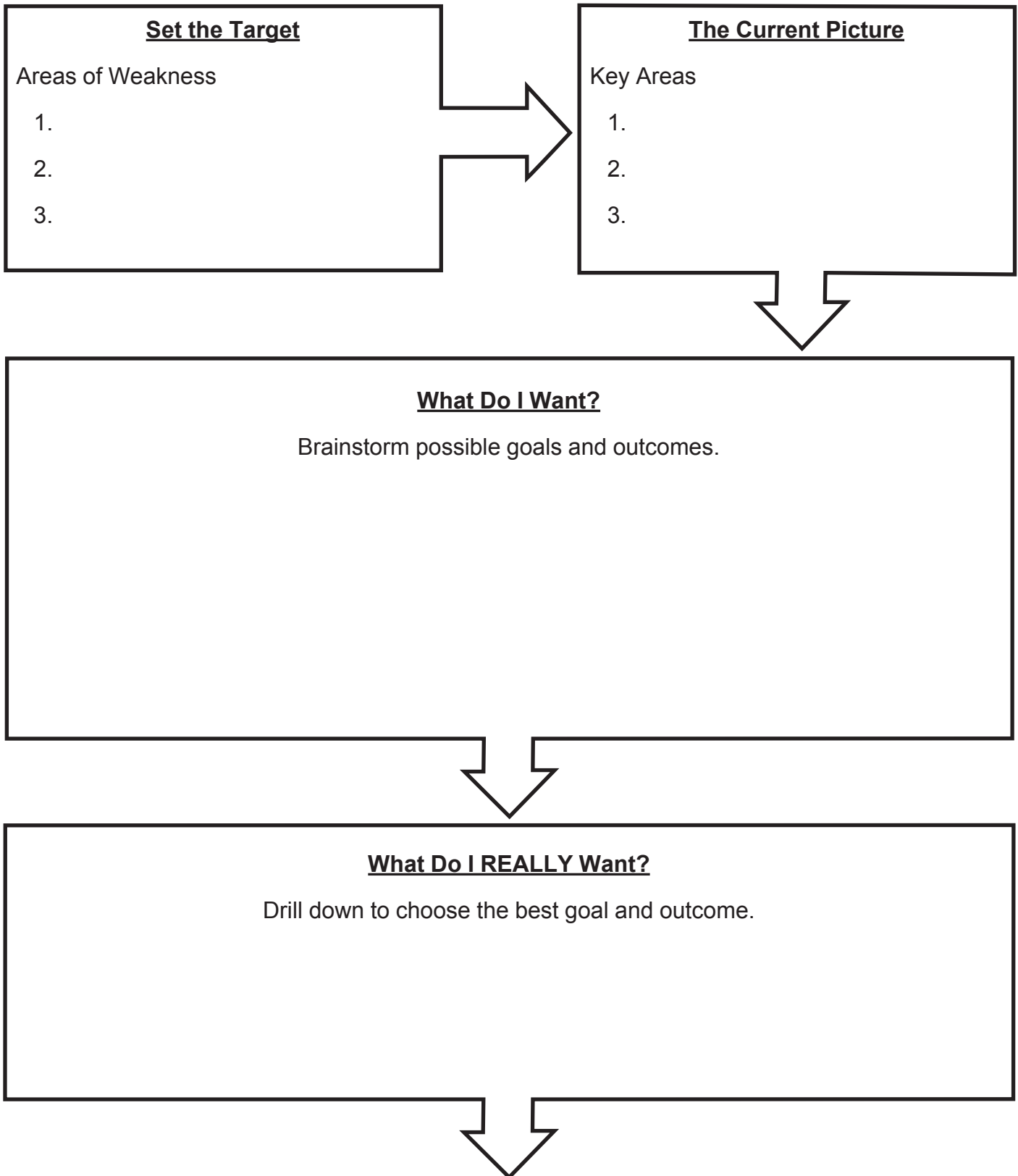
TIME-BOUND: The goal must be completed within the next three months.

My SMART Goal: Over the next three months, 7th and 8th grade students at Park Hill Middle School will taste test three varieties of whole grain-rich pastas that meet the meal pattern standards to select a student-preferred brand for next school year at a 65% student-approval rating.

Now it's your turn. Use the questions for each characteristic to create your SMART goal.

DO: Have participants create a SMART goal for what they would like to accomplish after this course.

Let's Set a SMART Goal



Develop a SMART Goal

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

SAY: Great job everyone. Having completed the process of developing a SMART goal, it should be clear that there are numerous benefits of using them, all of which ultimately result in personal and/or program improvement. Let's examine just a few of them.

One of the benefits is that SMART goals create a clear plan that is easy to monitor. Due to the specificity and time frames that are written into the goals, they clearly identify when and how the goals can be achieved.

For SMART goals to be relevant, they must be based on forecasted needs that are often identified through self-assessments. It is quite easy to overlook personal (or program) strengths and weaknesses in the course of day-to-day operations.

However, SMART goals force everyone involved to identify the areas they need to improve and the strengths they can use to help achieve the goals successfully.

President John F. Kennedy has been quoted, "Efforts and courage are not enough without purpose and direction." Although he wasn't referencing SMART goals, the implication is still the same. To be successful, everyone needs a sense of direction, and SMART goals can help to provide that by highlighting the priorities.

Using clear, concise language, each SMART goal establishes what area or issue needs to be addressed and reduces the opportunities to waste time on unimportant or meaningless projects.

Although this is far from an inclusive list of all of the benefits of using SMART goals, it is easy to see they are an invaluable resource. Whether using them for personal advancement or program improvement, SMART goals offer the specific details that will necessitate planning how to achieve greater success.

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

2022

01/24/2022

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/](https://www.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.

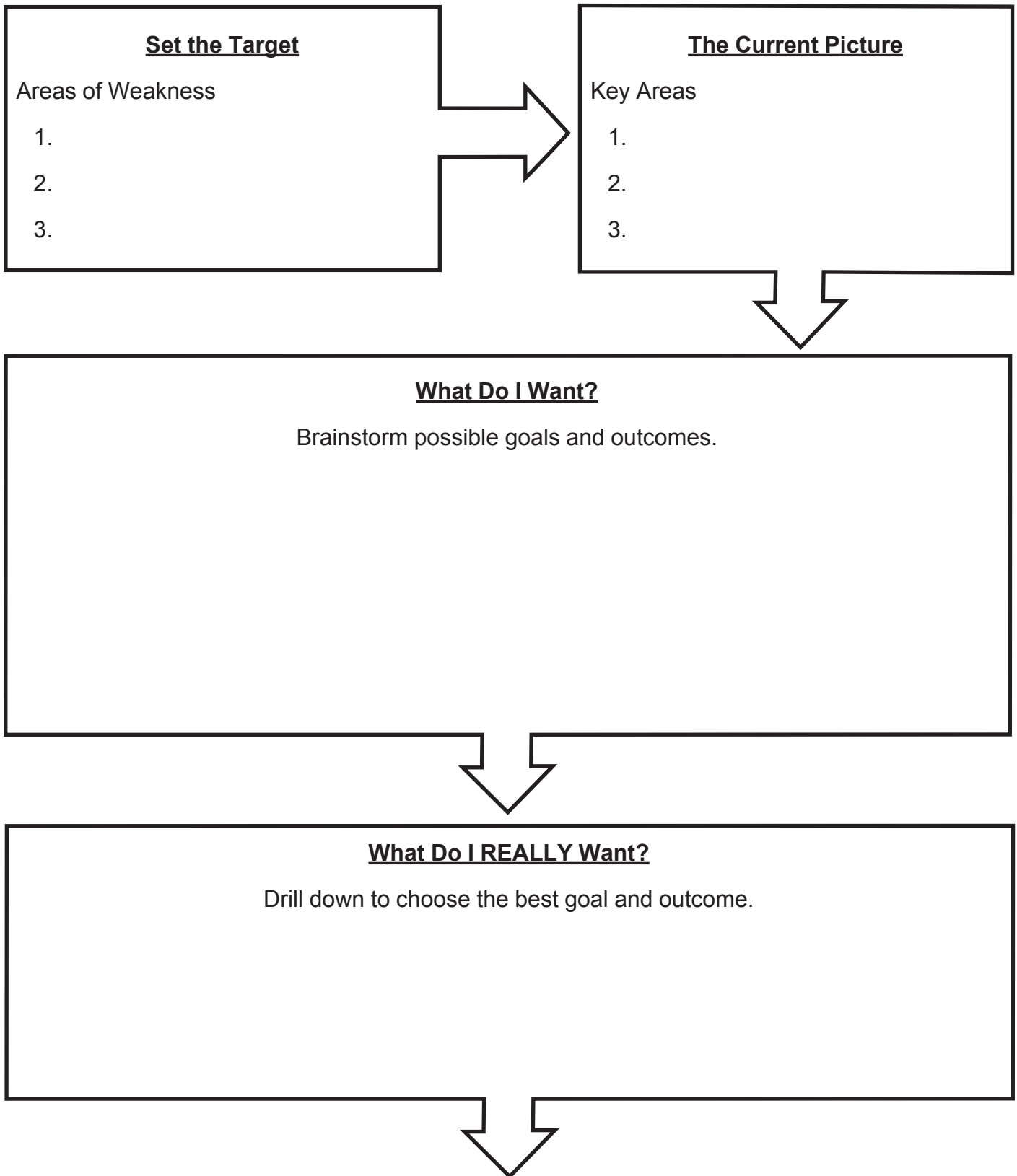
A (achievable) – It needs to be something that we can actually do. Remember, we need to consider if we are willing to commit to make the necessary changes. We also need to be sure we aren't setting the bar too high or too low.

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> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

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

2022

08/17/2022

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 menu 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 food 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	Legumes	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 menu requirements reflect the key food groups recommended by the *Dietary Guidelines for Americans*. School meal requirements focus on food 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 components. For example, the menu planner may choose to offer choices within the same 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: 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.

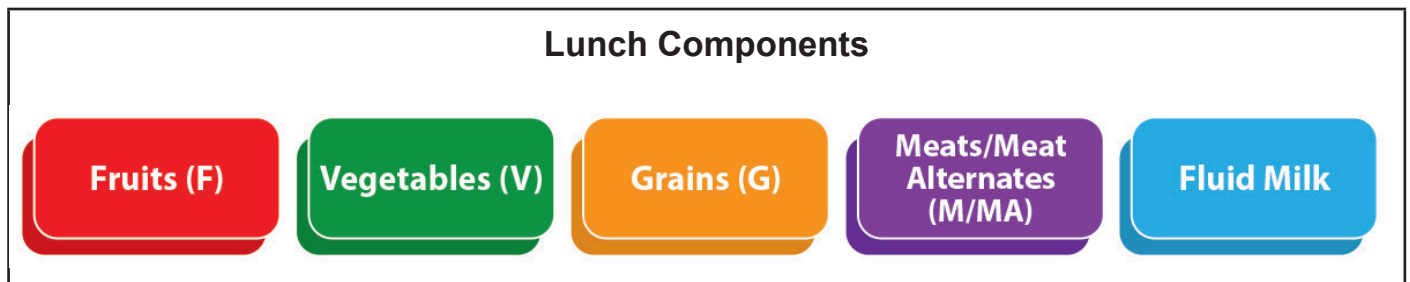
SHOW SLIDE: Food Components for School Meals

SAY: A food component is one of the food groups that comprises a reimbursable lunch or breakfast. There are five required food components at lunch and three required food components at breakfast. Food components must be offered in at least the daily minimum required amounts and weekly minimum amounts, if applicable. Lunch and breakfast meal components share many similarities and have some distinctive requirements specific for each meal. We will discuss the similarities and the specific requirements throughout this training.

SHOW SLIDE: Food Components for Lunch

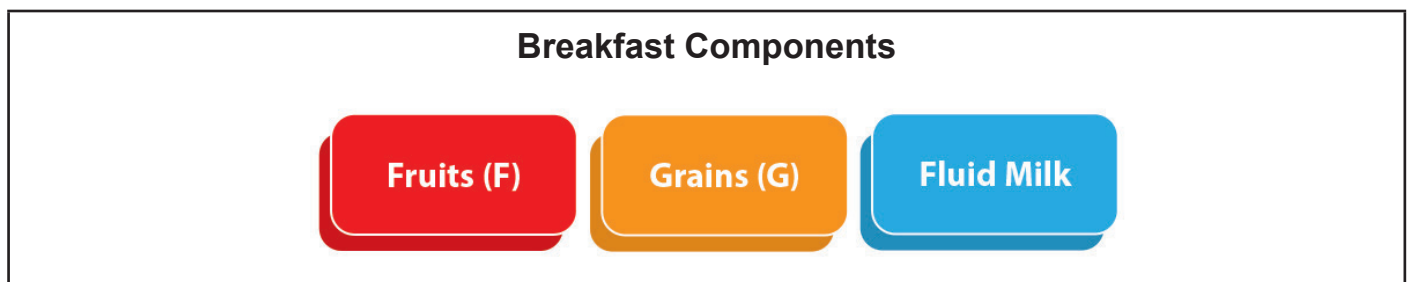
SAY: The food components that must be offered in a reimbursable lunch are:

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

**SHOW SLIDE: Food Components for Breakfast**

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

- Fruits (or vegetables as a substitute)
- Grains (or optional 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 food components. Food items may include multiple choices from any of the required components and must be offered in the minimum quantity for the component to be credited. For example, separate $\frac{1}{2}$ cup servings of peaches, applesauce, and pears are three food items that, when selected, comprise one component (fruit). Although three different choices or food items are offered, all of the choices are from the same food component (fruit). A breakfast food item is a specific food offered in a reimbursable breakfast from the three food components. For the purposes of Offer Versus Serve (OVS), a school must offer at least four food items from the three required food components (fruits, grains, milk).

ACTIVITY: Reimbursable School Meals Components

Materials: none

Time: 5 minutes

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

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

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

ASK: What 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 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	½ cup	2 ½ cups
Grades 6–8	½ cup	2 ½ 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 ¼ cup of raisins contributes ½ 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 $\frac{1}{2}$ cup. Menu planners may allow students to select more than the minimum daily required serving for this 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 food 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
- Legumes (beans/peas)
- 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 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 (legumes), 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	Legumes	Starchy	Other	
Grades K–5	1/2 cup	3/4 cup	1/2 cup	1/2 cup	1/2 cup	1 cup
Grades 6–8	1/2 cup	3/4 cup	1/2 cup	1/2 cup	1/2 cup	1 cup
Grades 9–12	1/2 cup	1 1/4 cups	1/2 cup	1/2 cup	3/4 cup	1 1/2 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 1/2 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: Legumes Vegetable Subgroups

SAY: Beans and peas (legumes) 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 and peas (legumes) 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: Legumes (Beans/Peas)

SAY: Some other examples of legumes 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 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

Chicken Stir-Fry Bowl	
Ingredient Statement: Chicken, brown rice, broccoli, red peppers, carrots, onions, water, olive oil, soy sauce, spices.	
CN	
CN	099135
<p>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>	
CN	
Net Wt.: 18 pounds	
	
Chicken Wok Company 1234 Kluck Street Poultry, PA 12345	

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	3 lb 8 oz 5 oz 10 lb				<ol style="list-style-type: none"> In a steam jacketed kettle, combine chopped onions, garlic, chicken, beans with liquid, water, chicken base, white pepper, and ground cumin. Simmer for 10 minutes to blend flavors, stirring occasionally.
Great Northern Beans, canned, low-sodium, undrained Water Chicken Base, low-sodium White Pepper Cumin, ground	17 oz 4 oz 2 oz	3 ¼ #10 cans			
Green Chili Peppers, canned, diced Chicken Stock, prepared from low-sodium base	15 oz	1 gal + 2 qt + 1 cup (as prepared)			<ol style="list-style-type: none"> Add green chili peppers. 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. 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				<ol style="list-style-type: none"> Top chili with ½ oz mozzarella cheese.
Serving Size	1 Serving Provides			Yield	
¾ cup (6 oz spoodle)	2 oz equivalent M/MA and ¼ cup vegetable, BP (legumes)			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 WW 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) WW 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 WW) on WW 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.

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	Legumes 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 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 food 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.

Transitional Standard: Grains

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 food 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.

Transitional Standard: Grains

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 component for both breakfast and lunch?

Yes, grains are a required 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 requirements will need to be offered on some days to meet the minimum weekly requirements.

Transitional Standard: Grains

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 component for a reimbursable lunch but is not a required 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 food 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. However, nuts or seeds such as sunflower seeds, almonds, walnuts, and hazelnuts may be used to meet no more than one-half of the meats/meat alternates component. They must be combined with another meats/meat alternates to meet the full requirement. 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 all or part of the 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: Dry Beans or Peas

SAY: The term “dry beans and peas” (legumes) 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 legumes 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 food 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: Legumes**ACTIVITY: Legumes****Materials:** Qualifying Legumes (Beans/Peas) 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 Legumes (Beans/Peas)** 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 and peas (legumes) 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. Provide the correct response after the participants have provided feedback. At the end of this activity refer participants to the **Qualifying Legumes (Beans/Peas)** handout located in the Participant's Workbook.

Qualifying Legumes (Beans/Peas)

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%) milk may be offered as part of the reimbursable meal for children in grades K–12.

Transitional Standard: Milk

Schools may offer flavored low-fat milk (1%) in addition to unflavored low-fat milk and flavored or unflavored nonfat milk.

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: *Water*

SAY: Schools participating in the NSLP must make 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 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 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 food components in the CNP meal patterns. FNS will also publish new guidance to allow crediting vegetables disguised as other food components or not provided in traditional forms, for example, noodles or pasta made from vegetables, including legumes.

SHOW SLIDE: Sodium

SAY: USDA continues to make low sodium USDA Foods available to schools. A list of available foods is on the USDA website (<https://www.fns.usda.gov/usda-fis/usda-foods-available>) with color coding for low sodium and whole grain foods.

Transitional Standard: Sodium

The weekly sodium limit for school lunch and breakfast will remain at the current level, known as Target 1, for school year 2022–2023. For school lunch only, the limit will decrease marginally (10%) in school year 2023–2024 (Sodium Interim Target 1A) to put schools on an achievable path toward long-term sodium reduction, which will be addressed in future rulemaking.

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 food 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 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 food 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 food 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:

- ½ cup of vegetables or
- ½ cup of fruits or
- ½ cup of an item with both fruits and vegetables (e.g., a carrot/raisin salad) or
- Two ¼ 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 ½ 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 food 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 $\frac{1}{2}$ cup of fruit and $\frac{1}{2}$ 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>WW Tortilla 2 oz eq Grains</p> <p>Vegetables 1/8 cup Red/Orange Vegetable 1/8 cup Legumes</p>
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Not Reimbursable Meal

- Only 1/4 cup Vegetables
- Must be 1/2 cup for a reimbursable meal

K-8 Lunch Speed Round 2 Answer

	<p>Tossed Salad 1/2 cup Dark Green Vegetable 1/2 cup Red/Orange Vegetable</p>
	<p>Broccoli 3/4 cup Dark Green Vegetable</p>
	<p>Fresh Orange 1/2 cup Fruit</p>

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 1/4 cup Red/Orange Vegetable</p>
	<p>WW Crackers 1 oz eq Grain</p>

Not Reimbursable Meal

- Only 1/4 cup Vegetables
- Must be 1/2 cup for a reimbursable meal

K-8 Lunch Speed Round, continued

K-8 Lunch Speed Round 4 Answer

   	<p>Hamburger on a WW Bun 2 oz Meats/Meat Alternates 1½ oz eq Grains</p> <p>Carrots ½ cup Red/Orange Vegetable</p> <p>Bean Salad ½ cup Legumes 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>WW Pita 1 oz eq Grain</p> <p>Bean Salad ½ cup Legumes ¼ cup Other Vegetable</p>
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Reimbursable Meal

K-8 Lunch Speed Round 6 Answer




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

Reimbursable Meal

K-8 Lunch Speed Round 8 Answer

	<p>Milk 1 cup Milk</p>
	<p>WW Spaghetti and Meatballs 2 oz Meats/Meat Alternates 1 oz eq Grain ¼ cup Red/Orange Vegetable</p>
	<p>WW Grain-Rich Roll 1 oz eq Grain</p>

Not Reimbursable Meal

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

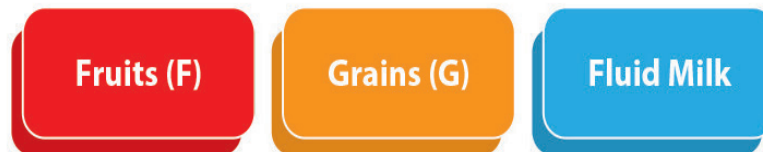
REIMBURSABLE OVS BREAKFAST MEALS

Objective: Recognize an OVS reimbursable breakfast meal.

SHOW SLIDE: Food Components for OVS Breakfast

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

- Fruits (or vegetables as a substitute)
- Grains (or optional meats/meat alternates (M/MA))
- 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 (or meats/meat alternates offered for this component) and milk
- At least ½ cup of fruit or vegetables or fruit/vegetable combined

SHOW SLIDE: OVS Breakfast Choices

SAY: Except for selecting a ½ 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 ½ 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 ½ 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.

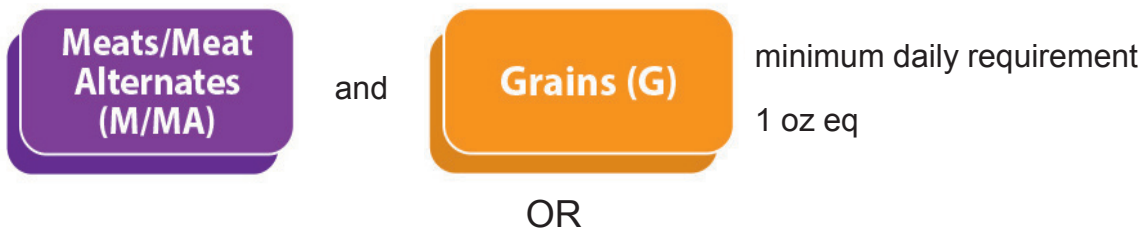
SHOW SLIDE: Smoothies

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 ½ 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: Breakfast M/MA

SAY: Menu planners have two options for including meats/meat alternates options in breakfast:

1. A school may offer meats/meat alternates options in place of grains after the minimum daily grains requirement (1 oz eq for all grade groups) is offered. The student does not have to select the grains item in order for the meats/meat alternates to credit as a food item on the student's tray.



2. A school may offer a meats/meat alternates as an extra food and not credit it toward the grains component.



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
- Meats/Meat alternates in Place of Grains Breakfast Menu Example
- Extra Food Breakfast Menu Example

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 (or meat/meat alternate if offered for this component) and milk, the student must select the minimum required daily serving; and
- 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 (or meat/meat alternate if offered for this component) 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 (or meats/meat alternates if offered for this component) 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: Meats/Meat Alternates in Place of Grains Breakfast Menu Example

Instructions: Review the Meats/Meat Alternates in Place of Grains Breakfast Menu Example and answer the corresponding questions.

Meats/Meat Alternates in Place of Grains Breakfast Menu Example

Menu with 4 food items:

- | | | |
|-------------------|-----------------------------|----------------|
| • Slice of toast | (1 oz eq grain) | (1 grain item) |
| • Hard-boiled egg | (1 oz eq credited as 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 (or meats/meat alternates if offered for this component) 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.

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 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 cereal 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.

Breakfast Scenarios, continued

Scenario: Extra Food Breakfast Menu Example

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

Extra Food Breakfast Menu Example

Menu with 4 food items with meats/meat alternates offered as an extra food:

- | | | |
|-------------------|-----------------|----------------|
| • Slice of toast | (1 oz eq grain) | (1 grain item) |
| • Hard-boiled egg | | Extra food |
| • Orange slices | (½ cup fruit) | (1 fruit item) |
| • Apple juice | (½ 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 (or meats/meat alternates if offered for this component) 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 food items are offered on this menu? What are the food items?

Answer: This OVS menu example contains only four items: toast, orange slices, apple juice, and milk.

If a student selects the hard-boiled egg, could this food item be credited as one of the three food items required for a reimbursable meal?

Answer: No, the egg is an extra food and may not be counted as one of the three food items required for a reimbursable breakfast.

What must a student select to have a reimbursable breakfast?

Answer: A student must take at least one of the fruit items plus two additional items.

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 food 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 food components for lunch (or three food items for breakfast) and also selects less than the required serving size of additional food 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 food components/food items in reimbursable meals and à la carte foods. If a student does not select the required food 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 food 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 (½ cup fruit) (1 fruit item)
- Apple slices (½ cup fruit) (1 fruit item)
- Pineapple chunks (½ cup fruit) (1 fruit item)
- Mixed berries (½ 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 (or meats/meat alternates offered for this component) 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 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.

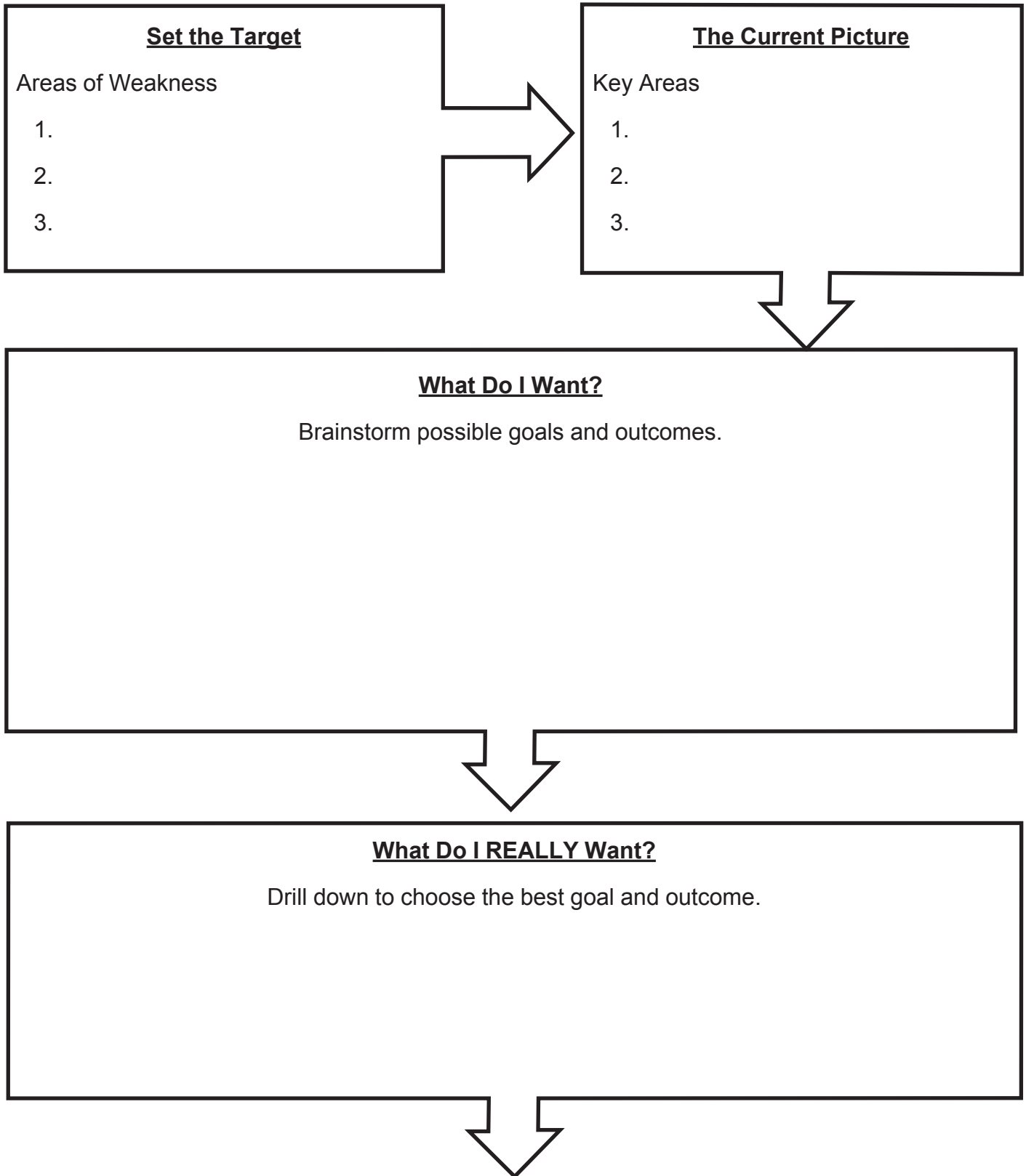
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p>	

Meal Accommodations for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 hour



Key Area: 1 (Nutrition)

USDA Professional Standards Code: 1160

2022

01/24/2022

Role of the School Nutrition Director

The SNP is required to offer meal accommodations 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 recognized medical authority
- 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 recognized medical authority

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 accommodations.
- List required components of the diet prescription.
- 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 diet prescription.			
5 minutes	<ul style="list-style-type: none"> • Disability • Reasonable Accommodations • Non-disability 	Sample Diet Prescription	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 Accommodations

SHOW SLIDE: Meal Accommodations

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 accommodations in schools, it will help guide your decisions and make the process of meeting children's meal accommodations 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 diet prescription.
- If the diet changes, a new prescription must be obtained from the physician or recognized medical authority.
- New diet prescriptions must be dated so that it is clear which diet prescription is current.
- Out-dated diet statements/prescriptions 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 diet prescriptions (also referred to as medical orders or statements) 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 special diets, 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 accommodations for disabilities/non-disabilities. Sometimes these accommodations can be met through minor modification to the existing school menu at minimal or no additional cost. Other accommodations that require special foods, supplements, or consultations with medical professionals can be a significant expense. No additional reimbursement is made for meal accommodations due to a disability.

Local educational agencies must make reasonable modifications to the meal, including providing meal accommodations 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 of 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, recognized medical authority can decide if the child's condition is a disability. SNPs should not second guess the determination of the recognized medical authority in the diet prescription.

Recognized medical authorities must be State licensed to write medical prescriptions. The persons allowed to write prescriptions vary by state. In most states, dietitians are included as recognized medical authorities.

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 diet prescription.

SHOW SLIDE: Components of the Diet Prescription

SAY: The required components in the diet prescription are:

- Information about the impairment which allows the SFA to determine diet restrictions. The prescription 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 recognized medical authority

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. School districts may have additional requirements for diet prescriptions.

Not all disabilities require meal modifications. Children 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 Diet Prescription**

Materials: Rachel's Diet Prescription worksheet

Time: 5 minutes

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

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

Rachel's Diet Prescription

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

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. If Rachel's condition does meet the definition of 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 diet prescription provided by a licensed medical professional?

Yes, the diet prescription was provided by a licensed medical professional.

4. Does the diet prescription contain the required information?

Yes, the diet prescription 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: Meal Accommodations That Are NOT a Disability

SAY: If a child brings a diet prescription to school that does not meet the definition of a disability, you may make accommodations, but are not required to do so. Often, medical conditions or 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.

SHOW SLIDE: Substitutions for Children Who Are NOT Disabled

SAY: The USDA encourages SFAs to consider children's cultural, religious, and ethical preferences when planning meals. 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 conditions 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.

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 accommodations 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.

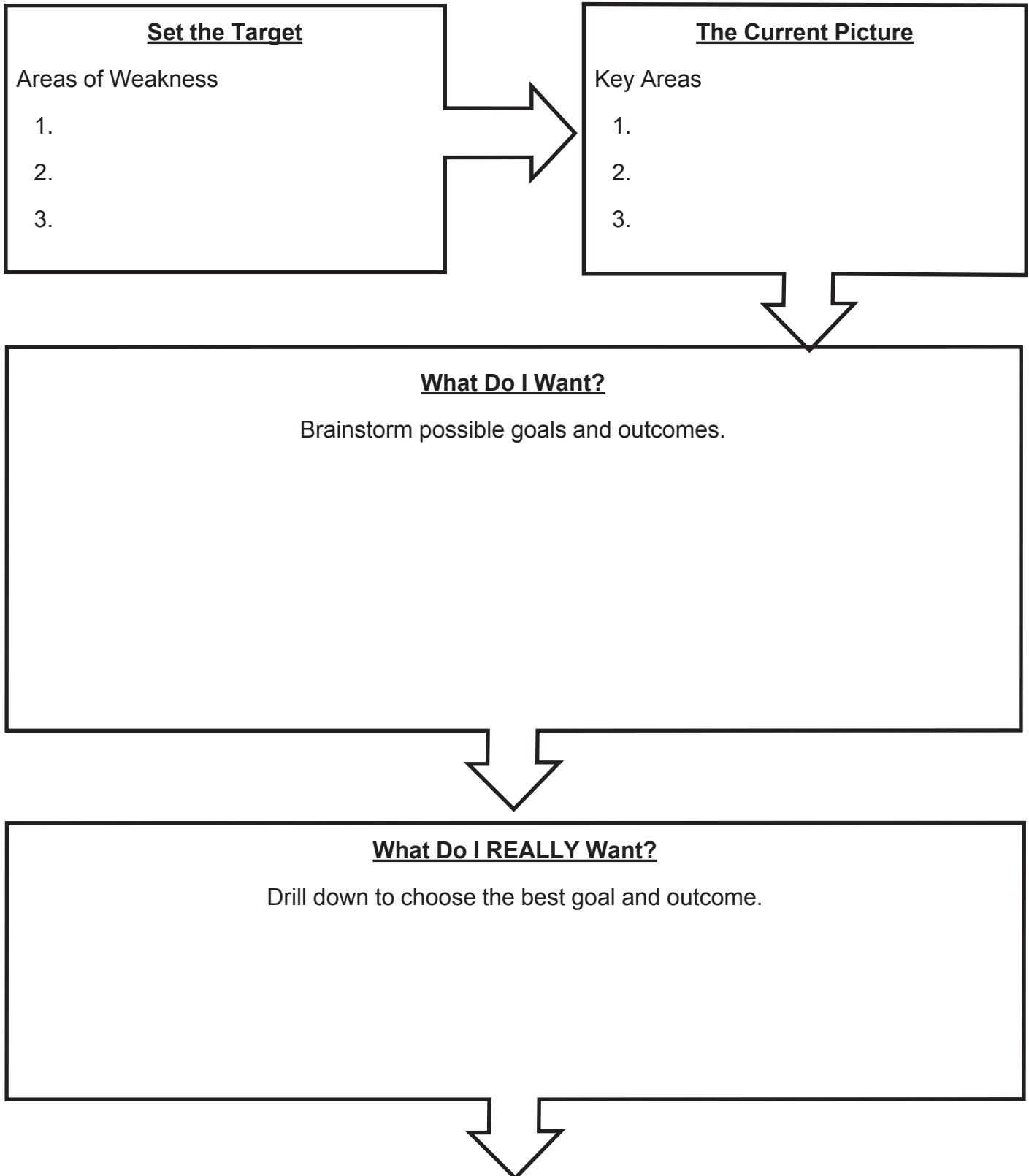
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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 Accommodations



SMART Goals for Meal Accommodations, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<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

2022

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 foodservice assistants 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. Food 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.
*Fresh romaine lettuce, outer leaves, rinsed, dry	5 lb	100 leaves	10 lb	200 leaves		8. Critical Control Point: Hold for hot service at 135 °F or higher. 12
Two wraps provide 1 oz equivalent meat, $\frac{3}{4}$ cup dark green vegetable, $\frac{1}{4}$ cup fruit, and 1 $\frac{1}{2}$ oz equivalent grains. 15						9. Top each romaine leaf with a 6 fl oz spoodle ($\frac{3}{4}$ 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
One wrap provides $\frac{1}{2}$ oz equivalent meat, $\frac{3}{8}$ cup dark green vegetable, and $\frac{3}{4}$ 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

SAMPLE

Daily Menu Production Record — Food Based Menu Planning

- Name of school/state: Eagle's Nest Elementary
- Grade Group: K-5
- Date: September 20, 2022
- Menu: Grilled cheese sandwich or Chicken nuggets & Rice plaf. Broccoli, Cherry tomatoes, Celery sticks, Fruit cocktail, Orange wedges
Milk: assorted fat-free & 1%

<input type="checkbox"/>	Breakfast
<input type="checkbox"/>	Lunch
<input type="checkbox"/>	OVS
<input type="checkbox"/>	Pre-plated (served)

R = Reimbursable

NR = Nonreimbursable

T = Total

Reimbursable Meals

- Number of student meals planned (projected): 50
- Number of student meals offered (prepared): 45
- Number of student meals selected (served): 45

Nonreimbursable Meals

- Number of student meals planned (projected): 5
- Number of student meals offered (prepared): 5
- 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			
			Meat/Meat Alternates	Grains	Fruits	Vegetables	Milk	R	NR	T	R		NR	R	NR	T				
Grilled Cheese Sandwich	R#32	1 ea	2 oz eq	2 oz eq WGR						24	5	24	48 sl WG bread 3lb cheese	20	5	20	20	20	No leftovers, all children were offered both choices	
	P#4203	#6 scoop (6 ea)	2 oz eq WGR	1 oz eq WGR						30	5	35	5.6 lb	30	5	35	28	4		32
Brown Rice Plaf, 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								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, RTU) Red orange vegetable Celery Sticks (3 ea, RTU) Other vegetable	R#18	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
Projected quantity based on FBG yield for drained fruit: 2 #10 cans										30		30	2.25 lb	30		30	26		26	
Fruit cocktail in light syrup, drained, USDA Foods Diced Peaches, drained	R#3	4 fl oz spoodle								35	3	38	2 #10 cans	35	3	38	25	3	28	Substituted peaches, 5 cups leftover, refrigerated for use in breakfast tomorrow
Orange Wedges (138 count)	R#5	4 fl oz spoodle								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	1 cup								5		5	5	5		5			5	No leftovers
	502	1 cup								30		30	30	28		28			28	
503	1 cup								10		10	10	10		10			10		

Projected quantity based on FBG yield for 130 count oranges, 4.5 lb for 15 1/2 c portions

Manager Signature

09/20/2022

35 Verifier Signature

Date

Adapted from USDA's Anatomy of a Production Record Appendix 4.A

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, (½ cup in sample)
- 19 Vegetables – portion offer in volume (¼ 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>SNP Assistants 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: 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.

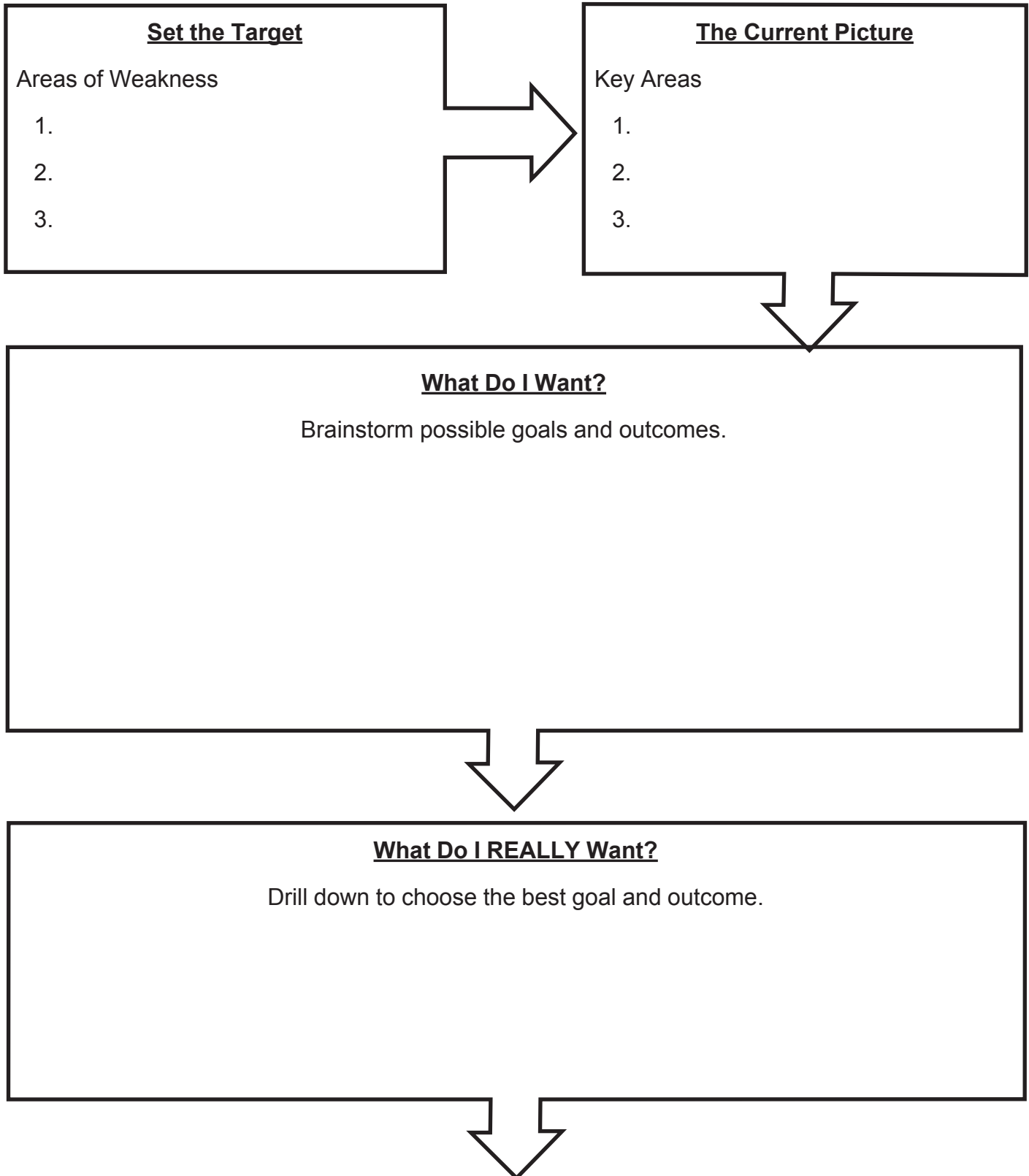
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

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

2022

01/24/2022

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 	Mock 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. 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: 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)

SHOW SLIDE: *Activity: Stakeholders*

ACTIVITY: Stakeholders

Materials: **Stakeholders** handout

Time: 10 minutes

Instructions: Refer participants to the **Stakeholders** handout in the Participant's Workbook.

SAY: I have written the name of each stakeholder on chart paper and posted the chart paper around the room. I will separate you into groups based on each stakeholder. As a group, write what you feel are the roles of a stakeholder. I will give you about 1 minute. We will then review the **Stakeholders** handout. This handout identifies stakeholders and their roles in the SNP.

DO: Separate participants into five groups. After 1 minute go over what is written on the chart paper. Review the **Stakeholders** handout.

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

<p>State Agency</p> <p>the agencies responsible for administering the Child Nutrition and Food Distribution Programs</p>	<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
<p>United States Department of Agriculture (USDA)</p> <p>the Federal agency responsible for the administration of the Child Nutrition and Food Distribution Programs</p>	<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 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: Mock Bean Burrito Product Description**ACTIVITY: Mock Bean Burrito Product Description**

Materials: Key Information to Include in Product Description Specifications handout and Mock 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 **Mock 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 **Mock Bean Burrito Product Description** and determine if there is additional information that should be added to the sample.

SAY: Turn to the **Mock 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 **Mock Bean Burrito Product Description** activity template.

DO: At the conclusion of the activity, refer participants to the Participant's Workbook for the **Mock Bean Burrito Product Description Example**. Remind participants this is only an example, and other product descriptions may better meet the needs of their district.

Mock 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.

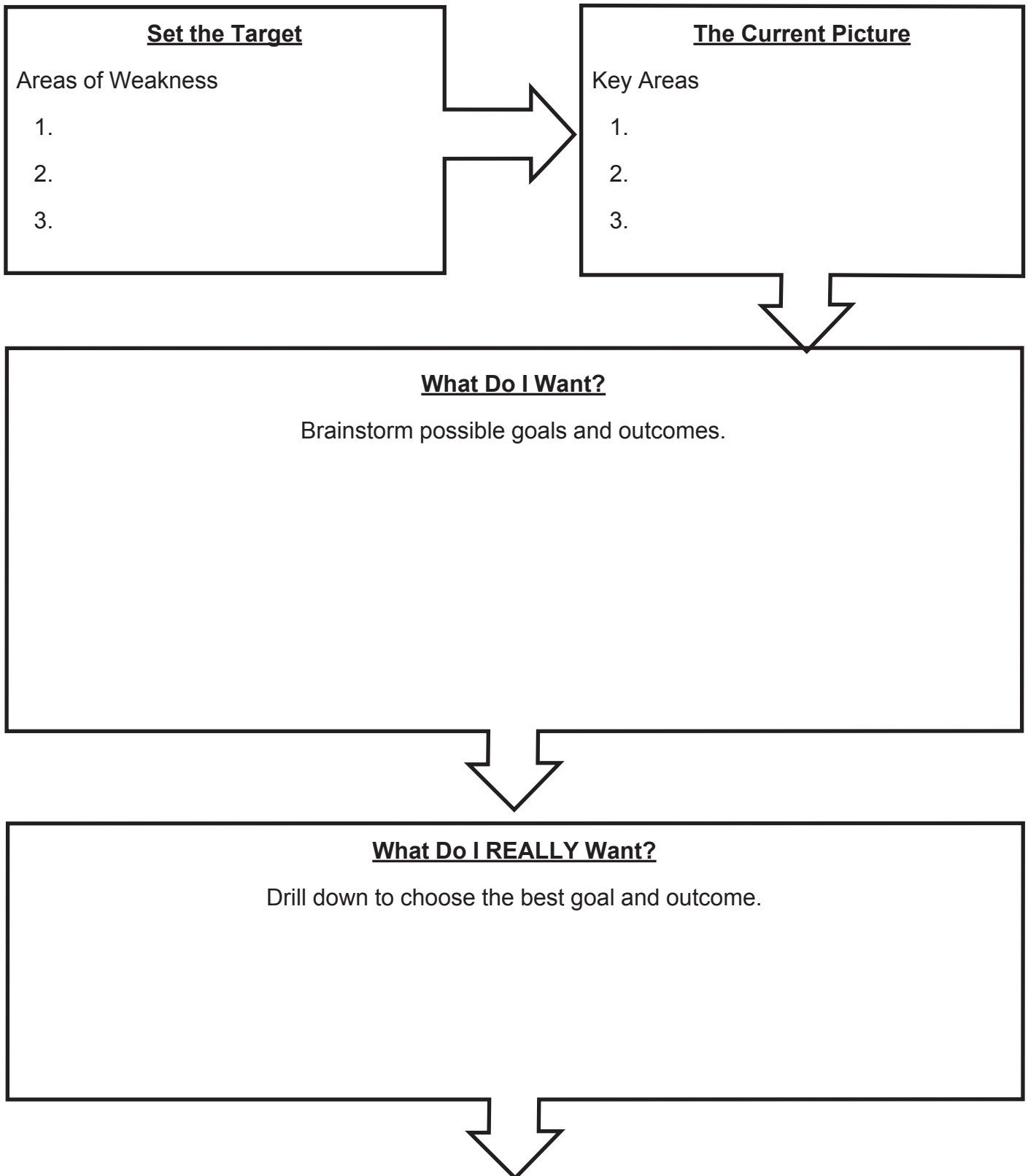
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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



SMART Goals for Procurement and Inventory Management, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

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

2022

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 • Appropriate vs Inappropriate 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: Appropriate vs Inappropriate Scenarios*

ACTIVITY: Appropriate vs Inappropriate Scenarios

Materials: **Appropriate vs Inappropriate Scenarios** handout

Time: 20 minutes

Instructions: Divide participants into teams. Assign each team a cafeteria scenario from the **Appropriate vs Inappropriate Scenarios** handout to role-play. The scenario examples are fictitious and from different grade levels. Their assignment is to demonstrate in a skit a nutrition employee being rude to the customer and then to repeat the same scenario demonstrating a nutrition employee being nice to the customer.

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 demonstrate in a skit a nutrition employee being rude to the customer and then to repeat the same scenario demonstrating a school nutrition staff being nice to the customer. In the interest of time, both versions should take no more than 1 –2 minutes to role-play. Please take a few minutes to prepare with your team. I encourage you to share the parts. Please let me know if you have questions, and I can help you find props in the training room.

DO: Assign each group a scenario.

Appropriate vs Inappropriate Scenarios

Instructions: Demonstrate in a skit a school nutrition staff being nice to the customer, and then repeat the same scenario demonstrating a skit a nutrition employee being rude to the customer.

First Grade Student

A terrified student in the serving line cannot remember what menu choice that she signed up for in the morning classroom tally.

- **The staff offers a smile and asks the child which choice they would like, indicating that they are welcome to either choice.**
- **The staff member tells the child to “hurry up” and asks the teacher which choice they made this morning.**

Second Grade Student

A student drops their tray as they were leaving the serving line on way to cashier.

Note: The student's hands and arms are also holding a coat, hat, and gloves for recess after lunch.

- **The cashier asks an available staff member to help clean up the mess while the child puts their things down in the cafeteria. Allow the student to return to the line to get a new tray.**
- **The cashier is visibly upset by having to hold up the line. The cashier then yells for someone to clean up the mess, places the tray on top of the child's things, and says, “Do not drop this one.”**

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 child on his winning touchdown, and tells the other staff members on the line he got the winning touchdown.**
- **The server looks frustrated and tells him he is holding up the line, and to grab his tray and go sit down.**

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 school nutrition staff smiles and tells her to have a great day.**
- **The school nutrition staff tells her to get some more food and to be more respectful.**

High School Students

A student's boyfriend/girlfriend broke up with them, and they want to tell the cashier all about the break up. The student is visibly upset, and the cashier is busy with long lunch line.

- **The cashier tells the student that they are sorry to hear that and offers a smile. The cashier also tells the student to have a great day.**
- **The cashier tells the student to dry their tears and move down the line; they do not have time to hear about their boyfriend/girlfriend.**

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 school team but politely tells him that it is against school policy to give him another slice for free.**
- **The server tells him that he's holding up the line, and he knows he does not get free pizza.**

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.

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	2	3
How does the food taste?	1	2	3
How is the texture?	1	2	3
How does the food feel in your mouth?	1	2	3
How does the food smell?	1	2	3
Was it the right temperature?	1	2	3
How do you like the food?	1	2	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.

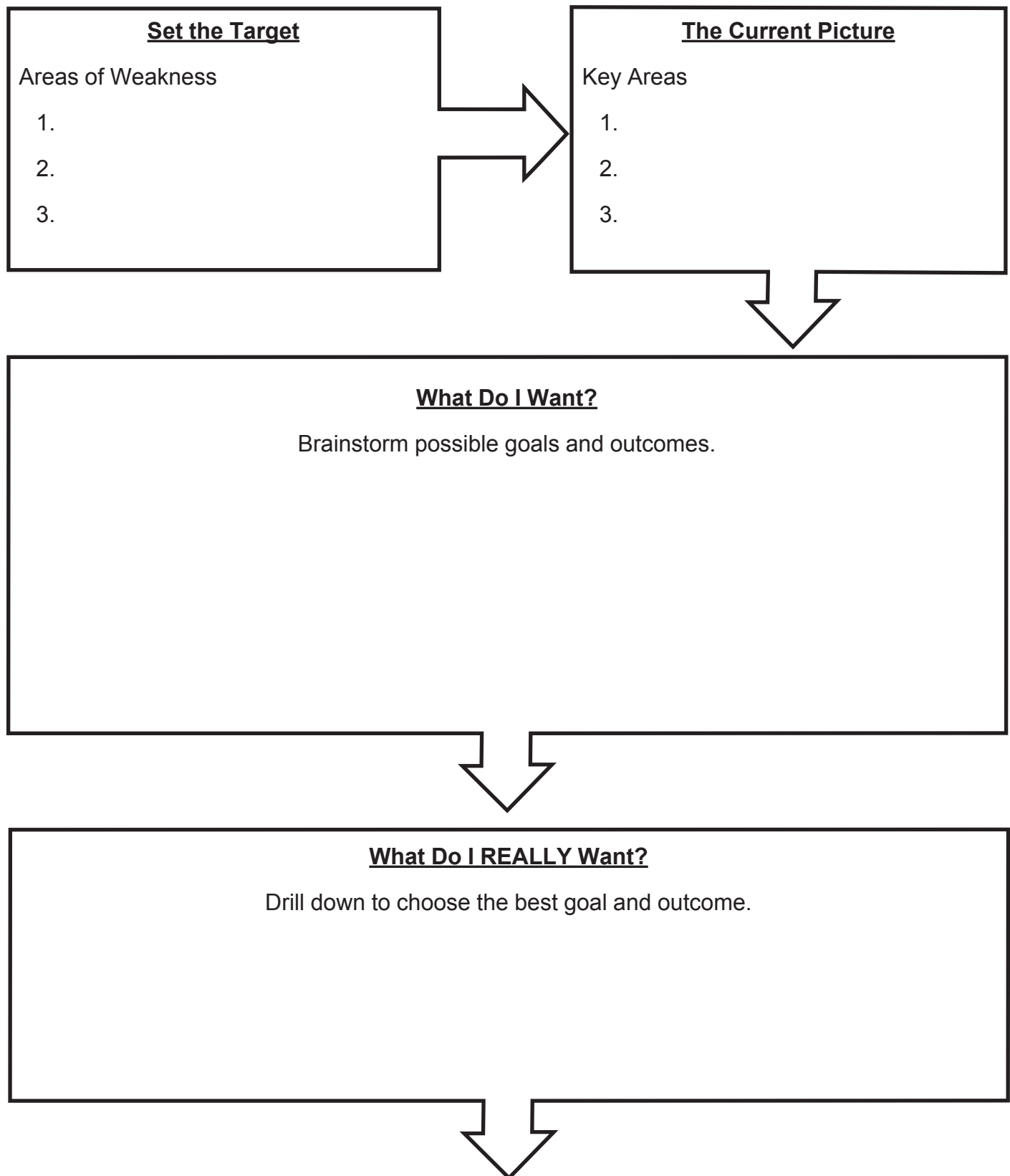
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

Marketing for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 2 hours



Key Area: 4 (Communication)

USDA Professional Standards Code: 4120

2022

Lesson Objectives

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

- Describe the importance of marketing in school nutrition programs.
- Identify the basic principles of marketing.
- Identify the elements of a marketing plan.
- Identify new marketing ideas.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Describe the importance of marketing in school nutrition programs.			
30 minutes	<ul style="list-style-type: none"> • Lesson objectives • Purpose of Marketing SNPs • Role of School Nutrition Director 	<ul style="list-style-type: none"> • Review Objectives • Convincing Someone to Eat a Food They are Reluctant to Try • Getting to Know You • Table Chat 	Participant's Workbook
Objective: Identify the basic principles of marketing.			
50 minutes	<ul style="list-style-type: none"> • Definition of Marketing • Techniques of Marketing • Principles of Marketing 	Role of Advertising in Marketing	Participant's Workbook
Objective: Identify the elements of a marketing plan.			
30 minutes	<ul style="list-style-type: none"> • Marketing Plan • School Menus as a Marketing Tool 	Steps to Preparing a Successful Marketing Plan	Participant's Workbook
Objective: Identify new marketing ideas.			
10 minutes	<ul style="list-style-type: none"> • Elements of a Marketing Plan • Conclusion – SMART Goals 	<ul style="list-style-type: none"> • Marketing Tools • Brainstorming Marketing Ideas 	Participant's Workbook
Total: 2 hours			

Marketing

SHOW SLIDE: Marketing

SAY: Welcome to Marketing, an Introduction to School Nutrition Leadership lesson for school nutrition directors. As a school nutrition professional, it is very important for the students in your school to participate in your school nutrition program (SNP), right? Then give them a good reason to do so!

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

SAY: Before you begin any marketing campaign, you must understand the importance of marketing. Marketing is taking place every day in your life. Think of how many pieces of mail you receive on a daily basis as a part of a company's marketing plan. Today we are experiencing social media at a 24/7 rate. We receive advertisements on nearly every web page, cell phone app, or streaming service.

Let's have a little fun to demonstrate how we are influenced by creative marketing. I'll say a slogan, and you can either complete it or say the name of the company that is being advertised. It's okay to call out the answer. Ready?

- "Just Do It" **Nike**
- "Got _____?" **Milk**
- "The Quicker Picker Upper" **Bounty**
- "Like a Good Neighbor, _____ is There" **State Farm**

Nice job! A slogan is short and simple and is only one style of marketing. As you heard there are many memorable slogans associated with food. For example, the "Got Milk?" campaign was so successful producing a positive image of drinking milk that it lasted over 10 years. The milk mustaches were an excellent example of successful marketing.

Objective: Describe the importance of marketing in school nutrition programs.

SHOW SLIDE: Purpose of Marketing School Nutrition Programs

ASK: Why is it important for the school nutrition director to use marketing?

DO: Pause for volunteers to share ideas.

FEEDBACK:

A well thought out marketing plan is an important tool in enhancing your SNP experience. Program improvements can mean the difference between success and failure. For example, raising the price charged for a school meal by \$0.25 may take a lengthy marketing campaign to gain acceptance and prevent a drop in participation.

SHOW SLIDE: Role of the School Nutrition Director

ASK: Would you agree that the role of the director includes knowing what the customer wants and needs? Do you agree that once those needs and wants are identified, the director must then provide products and services that satisfy customer demands? How can administrators and faculty can also benefit from a school nutrition marketing campaign?

DO: Allow 1 or 2 participants to respond.

SAY: A successful marketing campaign for SNPs helps school administrators and faculty:

- See the value of the child nutrition programs
- Achieve nutrition-related educational objectives

SHOW SLIDE: Activity: Convincing Someone to Eat a Food They Are Reluctant to Try**ACTIVITY: Convincing Someone to Eat a Food They Are Reluctant to Try**

Materials: none

Time: 15 minutes

Instructions: Have participants think about a food that they are reluctant to try. Ask them to share that thought with the person next to them. Have them convince the other person to try eating that food at school. Give them start and stop times so that you each will have a turn.

SAY: I want each one of you to think about a food that you are reluctant to try. Share that thought with the person next to you. I want you to convince the other person to try eating that food at school. I will give you the start and stop times so that you each will have a turn.

DO: Allow participants 1 minute each.

ASK: How difficult was it to think of things you could say to quickly change someone's mind about a food preference?

DO: Allow 1 or 2 participants to respond.

SAY: Convincing anybody to change their ideas about any preference or lack of preference is difficult but as we know, changing preference for food choices is one of the most difficult changes for a person to make. Encouraging students to try something new at least once may help them to change their idea about that food. So, now that you were or were not convinced to eat a food item that you were reluctant to try, let's talk about working with your customers to get them to dine in your cafeteria.

SHOW SLIDE: Activity: Getting to Know You**ACTIVITY: Getting to Know You**

Materials: none

Time: 5 minutes

Instructions: Ask participants to remain silent until you say they can talk. Remaining silent, ask participants go stand next to a participant in the room that they do not know and have not had the chance to talk with this week. (Wait for participants to pair up.) Give them 2 minutes to introduce themselves to each other.

SAY: Next, we are going to do an activity where I will ask you to remain silent until I say you can talk. Remaining silent, please go stand next to a participant in the room that you do not know and have not had the chance to talk with this week. (Wait for participants to pair up.) Now, you may talk for 2 minutes introducing yourselves to each other.

DO: Allow participants 2 minutes.

SAY: Please return to your seats.

ASK: Did you enjoy getting to meet someone new? Was it a challenging experience to approach a new person? Are you more apt to talk to them again now that you have met?

SAY: Marketing begins with communication. It can be easier to ask for feedback if you have already communicated and established a relationship with your customers.

SHOW SLIDE: Student-Based Groups

SAY: Raise your hands if you have conducted a student-based group.

A student-based group can be very effective in getting feedback from your customers. An effective way to get good feedback is by asking good questions. We will now review questions to ask your student-based groups and questions to ask yourself after you receive feedback from your customers.

SAY: Let's review some questions for student-based groups.

- Do you eat breakfast/lunch in the cafeteria? Why or why not?
- How often do you eat breakfast in the cafeteria?
- How often do you eat lunch in the cafeteria? Why or why not?
- What are your favorite fruits?
- What are your favorite vegetables?
- What are your favorite restaurants? (so you can replicate those items)
- What items do you like on the menu?
- How can we convince students to:
 - Participate in the school meals program?
 - Select a greater variety of vegetables and fruits?
 - Consume more nutrient-dense foods?
 - Eat a better quality diet?

SHOW SLIDE: *Activity: Table Chat*

ACTIVITY: Table Chat

Materials: index cards

Time: 10 minutes

Instructions: Divide participants into groups. Ask participants to design a "Table Chat" form. Have each team decide on three questions they would routinely want to ask the students when visiting at mealtime tables. They may write their ideas on an index card. Ask each team to summarize their questions.

SAY: Communication is key and another way to get routine feedback from our customers is to visit them at mealtime. Consider this practice as a shortened version of a focus group. Encourage your staff to make routine rounds in the cafeteria. This also provides an opportunity for the students to become acquainted with the nutrition staff as well. "Table chats" can be a great marketing tool. Let's design a "Table Chat" form. With your team, decide on three questions that you would routinely want to ask when visiting student's tables at mealtime. You may write your ideas on an index card. I will ask each team to summarize your questions.

DO: Allow 3–5 minutes.

Ask a volunteer from each team to share their "Table Chat" questions.

ASK: Do you think this would be a helpful practice in your schools? Do you think this could help to market your program? Who in your program can conduct a "Table Chat?" Can you collect usable data from these visits?

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

SAY: One way to convince students of the benefits of good nutrition choices is through a well-planned marketing campaign. Our second objective in today's lesson is for you to know the basic principles of marketing.

Objective: Identify the basic principles of marketing.

ASK: What is marketing?

DO: Allow 1 or 2 responses.

SHOW SLIDE: *Definition of Marketing*

FEEDBACK:

The American Marketing Association defines marketing as "... the process of creating, communicating, and delivering value to customers ...". In very simple terms, marketing SNPs is a planned approach to promoting and selling school meals, nutritious foods, healthy diet choices, and the school nutrition services to the students, school staff, parents, and community.

SAY: There are four broad techniques used in marketing.

SHOW SLIDE: *Techniques of Marketing*

SAY: Marketing involves several techniques including:

- Promoting
- Advertising
- Merchandising
- Selling the product or service

In the SNP, marketing includes all efforts to influence the customer's choice in a positive way, not just through advertising and promotions. Marketing and advertising are not the same.

SHOW SLIDE: Difference Between Marketing and Advertising

SAY: Marketing includes advertising, but it is more. It is both active and interactive, whereas advertising is presenting the sales pitch and is more direct. Advertising is more of the commercial way of marketing. Can you imagine where McDonald's or Kellogg's would be today if they did not market their products? Marketing is relatively new to SNPs because many directors did not previously realize the need for marketing school meals. Marketing started becoming more important to child nutrition programs in the 1990s when maintaining program participation became an issue. During those years, school nutrition directors began to realize that serving good food at low prices was not enough for high school students. Marketing has become a critical component in promoting school wellness. In addition, the implementation of wellness plans to create a healthy school environment has increased the importance of marketing the benefits and attributes of SNPs.

SHOW SLIDE: Activity: Role of Advertising in Marketing**ACTIVITY: Role of Advertising in Marketing**

Materials: Role of Advertising in Marketing worksheet

Time: 5 minutes

Instructions: Refer participants to the **Role of Advertising in Marketing** worksheet. Have participants look at the Foster Farms product advertisement in School Nutrition magazine. As they look at the front and back of the advertisement, have them think about the message, and then answer the three questions in the Participant's Workbook.

SAY: As we think about the advertising component of marketing, locate the **Role of Advertising in Marketing** worksheet the Participant's Workbook. Look at the Foster Farms product advertisement in School Nutrition magazine. You are looking at the front and back of the advertisement. Think about the message, and then answer the three questions on the worksheet. Work together with someone near you to answer the questions. You have about 5 minutes.

DO: Allow 5 minutes or less if participants finish the assignment.

Instructor's Note: Ask volunteers to answer the questions. Acknowledge all answers and provide some feedback that may not be addressed from participants pertaining to the role of advertising in marketing.

ASK: Do any of you think there are negative messages in the advertisement?

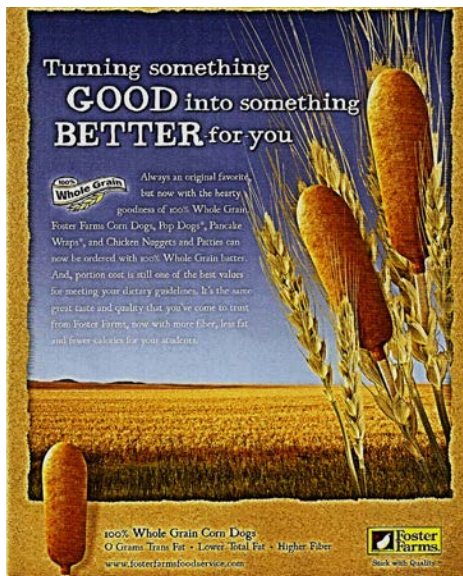
DO: Allow one or two participants to share answers.

Role of Advertising in Marketing

1. What message do you think the company is attempting to convey in the advertisement?
 - Foster Farms is marketing corn dogs with less total fat, 100% whole grain, 0 grams *trans* fat, and reduced sodium.
 - The backside of the advertisement emphasizes the idea that Foster Farms Corn Dogs meet the nutrient requirements of the SNP.
 - The product carries a CN Label and nutrition facts.
 - The wheat field on the front conveys freshness and may indirectly suggest the Farm-to-School initiative to some readers.

2. Who do you think the advertisement is targeting in the *School Nutrition* magazine?
 - school nutrition director
 - school site manager
 - school business officials, principals, and superintendents

3. What message in the advertisement would influence you most to try the product?
 - Acknowledge all answers as there are no right or wrong answers.



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SAY: When you are looking at a professional journal or magazine, you may find yourself attracted to some advertisements and not even see others. Think about what attracts you as we continue the lesson.

SHOW SLIDE: Marketing School Nutrition

ASK: Everyone should know that SNPs provide good products at reasonable prices to a intended audience. So, why do we need to spend time and money conducting a marketing campaign to elementary and secondary students?

DO: Allow one or two participants to answer.

SAY: In school nutrition, marketing is important because it is a way to:

- Promote school nutrition products as nutritious—to staff, parents, and community,
- Sell the SNP as part of the educational environment—this includes selling the program as a service that delivers healthful meals at school,
- Change the image of the program—get customers excited or interested so they keep participating,
- Influence dietary behaviors of students—encourage the acceptability of products that are nutritious and appealing,
- Help to increase participation in the program,
- Improve customer satisfaction.

ASK: What images do you think students have about the school lunch or school breakfast program?

DO: Allow one or two participants to respond.

FEEDBACK:

- Breakfast:
 - A healthy and nutritious way to start the school day
 - Easy to eat before class starts
 - Friendly staff
 - Great atmosphere
 - Convenient
- Lunch:
 - Healthy and nutritious
 - A variety of food choices
 - Friendly staff
 - Great atmosphere
 - Convenient

SHOW SLIDE: Types of Marketing**SAY:** There are basically two types of marketing.

1. Direct or commercial marketing is the process of promoting and selling the product or service. The advertisement in the School Nutrition magazine is an example.
2. Social marketing is a process for influencing human behavior on a large scale, using marketing principles for the purpose of societal benefit rather than profit. It is a process for influencing human behavior on a large scale.

SHOW SLIDE: What do you think should be the main focus of marketing school nutrition?**ASK:** What do you think should be the main focus of marketing school nutrition?**DO:** Pause briefly for responses.

Instructor's Note: Ask participants to raise their hands when you read the statement that they believe should be the main focus.

SAY: The main focus should be:

- Promoting and selling the food products
- Influencing students to make choices that benefit their overall health and wellness

Deciding on the focus can be a difficult decision because both the commercial and social marketing aspects are important to the success of the program. Social marketing is becoming more important as SNPs focus on influencing voluntary behavior of customers to improve their personal welfare. Currently, a large segment of the marketing activities to promote SNPs focuses on the importance of reimbursable meals as a way of providing nutrients necessary for the health and well-being of our children. With so much emphasis on wellness, social marketing may be essential for the sustainability of the program.

One of the most important aspects of any marketing lesson is a discussion about the established marketing principles. Marketing is not simply a clever advertising campaign like the "Got Milk" advertisements. It is based on four fundamental principles, products, price, place, and promotion, referred to as the "marketing mix" because they represent the four levels a marketer can use when trying to influence the target markets. The principles have been well established through marketing research and used in both commercial and social marketing.

SHOW SLIDE: Fundamental Ps of Marketing**SAY:** Product is the goods, services, or changed behavior. Price is cost to target group in money, time, and effort. Place is the outlet or spot where product is acquired, and promotion is the activities to "sell" or promote benefits of the product.

SHOW SLIDE: Social Marketing Principle #5

SAY: Although built on the cornerstones of the four original *Ps*, some social marketers include “policy” as a fifth principle when planning their strategies. Policy facilitates a course of action to support voluntary changes in behavior. If we think of social marketing as influencing public behavior, it is clear that public policy must be considered in any campaign to sell behavior change.

Our third objective for this lesson is to identify the elements of a marketing plan and learn how to incorporate the five principles of marketing into the plan.

Objective: Identify the elements of a marketing plan.

SHOW SLIDE: Elements of a Marketing Plan

SAY: A marketing plan is a written plan of an organized approach to change, with identified goals and objectives, and a description of the means to accomplish goals.

ASK: How many of you have a marketing plan in your district? (Ask participants to raise their hands.)

SHOW SLIDE: Activity: Steps to Preparing a Successful Marketing Plan**ACTIVITY: Steps to Preparing a Successful Marketing Plan**

Materials: Steps to Preparing a Successful Marketing Plan worksheet

Time: 10 minutes

Instructions: Refer participants to the **Steps to Preparing a Successful Marketing Plan** worksheet. Discuss the steps to producing a successful marketing plan. Ask participants to follow along and fill in the blanks in the Participant's Workbook.

SAY: There are ten steps to preparing a successful marketing plan. Look at the activity and follow along as we discuss the steps to producing a successful marketing plan. Fill in the missing blanks in the column on the left. The information in the column on the right will help guide our discussion of the 10 steps.

Steps to Preparing a Successful Marketing Plan

Steps	Information Related to Steps
1. Establish measurable objectives/goals	A goal must be measurable in order to determine whether or not it has been accomplished.
2. Identify the intended audience	The intended audience may involve all school levels or may be specific to certain schools or levels such as the high school level.
3. Assess the current situation	Examine the situation, identifying the strengths and weaknesses, and determining what needs to change.
4. Research the focus audience	Explore the current knowledge, beliefs, and behaviors of the intended audience.
5. Develop strategies and tactics	Strategies or tactics are approaches or activities used to accomplish the objectives or goals.
6. Develop a budget	Determine how many promotions will be used and the cost of each.
7. Establish timelines	Timelines should be realistic and followed as much as possible once established.
8. Implement strategies and tactics	Successful implementation of a marketing campaign must include planning, receiving material, training staff, the actual promotion, and follow-up evaluation.
9. Evaluate results	Measure the results of the marketing goals the campaign was designed to achieve in order to establish if they have been met.
10. Follow up	Modify the plan if needed. Make recommendations for future marketing campaigns.

Objective: Identify new marketing ideas.

SHOW SLIDE: *Activity: Marketing Tools*

ACTIVITY: Marketing Tools

Materials: Marketing Tools handout

Time: 10 minutes

Instructions: Refer participants to the **Marketing Tools** handout. Have the participants to get back in their teams and to review the list of marketing tools in the Participant's Workbook.

SAY: Find the **Marketing Tools** handout in the Participant's Workbook. Review the list of marketing tools. You can use these tools to market the school lunch and breakfast menus. Take a couple of minutes to discuss the tools with your table team, and then decide which tools are the top five based on results when the tools are used in your districts. If you have other tools that are not listed, we would like to hear about those also.

Instructor's Note: *Allow one person from each group to share their top five tools and any other tools not listed. If time allows, you may encourage more discussion.*

Marketing Tools

Instructions: Take a couple of minutes to discuss the tools with your table team, and then decide which tools are the top five based on results when the tools are used in your districts.

- Take-home menus should be attractive and carry nutrition information about the menu items.
- Post menus in the classroom in an attractive way to get the students' attention.
- Advertise menus over a public announcement system at school during morning announcements.
- Websites provide modern day means of promoting what's on the menu and the nutritious advantage to the meal.
- Local radio and television stations have found that early morning programs are popular with students before school and that they are interested in what's for lunch.
- Local newspapers often need fillers and are willing to carry the menus for breakfast and lunch as well as other information of interest.
- Menu boards and signage are excellent ways of marketing and advertising the menus in elementary, middle, and high schools.
- Involve students in menu planning by doing surveys to learn what foods should be put on the menus.
- Closed circuit or cable television and homework hotlines can be used to deliver the menu messages.
- Invite parents to eat lunch at school; they can be your greatest allies when you convince them of the value of their children eating school meals.
- Social media provides continuous updates on special events and daily news for the SNP.
- Cell phone apps provide a customizable source of information for your SNP.

ASK: Would anyone like to share marketing tools that were not on the list?

DO: Allow 1 or 2 responses as time permits.

SHOW SLIDE: Activity: Brainstorming Marketing Ideas**ACTIVITY: Brainstorming Marketing Ideas**

Materials: chart paper

Time: 10–15 minutes

Instructions: Have participants talk about some marketing ideas they can take back to their district.

SAY: There are many ways to market our programs, and each can start with a single idea. Today, let's complete our marketing discussion with some ideas to take back to your district. Take 5 minutes to brainstorm ways to encourage participation in your program. Please include ideas, both big and small, for one school or for many. It can be a simple project or a complex one. Finally, the idea can be implemented by the director or a single employee. We want to hear all of your ideas! Please list six per team on a chart paper. I will ask you to share your group ideas with the class.

Instructor's Note: *Allow one person from each group to share their top six ideas.*

ASK: Would anyone like to share some marketing ideas?

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.

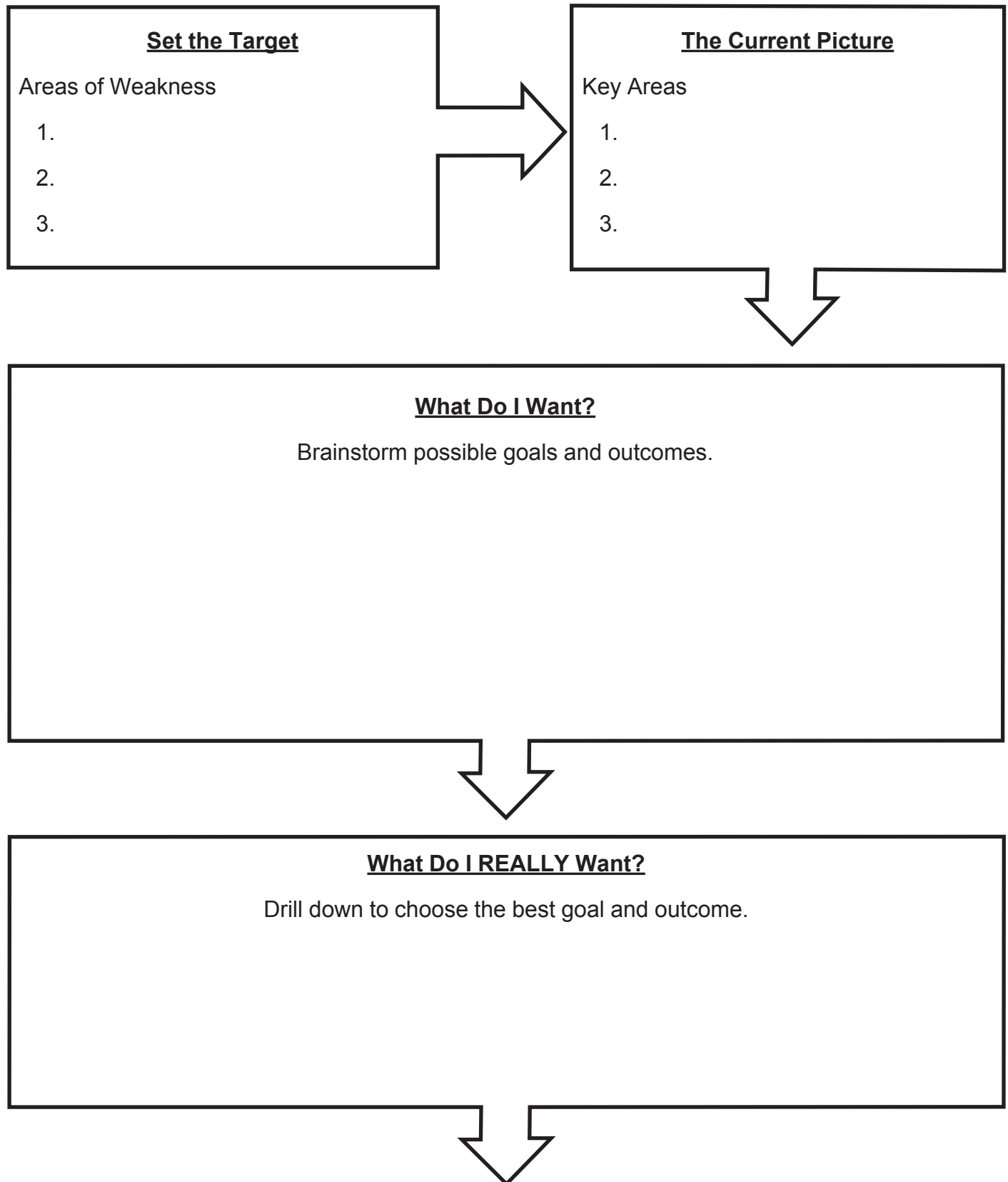
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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 Marketing. 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 Marketing** worksheet.

SMART Goals for Marketing



SMART Goals for Marketing, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

Essential Key Performance Indicators (KPIs) for School Nutrition Success for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 4 hours



Key Area: 3 (Administration)

USDA Professional Standards Code: 3340

2021

Role of the School Nutrition Director

Management of the school nutrition program's financial resources requires continuous review and analysis. The key performance indicators (KPIs) can help school nutrition directors by focusing on measuring critical areas of the school nutrition program (SNP).

When using the KPIs, school nutrition directors can validate gaps between current and desired performance and provide evidence when progress is made toward closing the gaps. The KPIs are a numbers-oriented approach to target specific areas of emphasis and assess results in an objective manner. School nutrition directors can set standards of expectation, identify problem areas, and measure progress in correcting these problems. The KPIs will indicate to the director where resources should be invested to have the most positive impact (such as equipment or labor), and they can be used to track the progress of major initiatives on participation, cost, and revenue.

When the school nutrition director utilizes a team approach and practices good financial management principles, the important role that all school nutrition staff play in the use of program resources is acknowledged. The director will realize that the effective and efficient use of program resources requires continuous analysis, monitoring, and evaluation.

Lesson Objectives

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

- Calculate meal equivalents and apply the information to measure the performance of school nutrition programs.
- Calculate average daily participation (ADP) and apply the information for forecasting and making decisions pertaining to labor, food purchasing, and menu planning.
- Interpret and analyze revenues on a monthly report to monitor trends of the current period, the previous period, and year-to-date of the school nutrition program.
- Interpret and analyze expenditures on a monthly report to monitor and identify monthly and annual trends.
- Calculate revenue per meal equivalent to determine if there is sufficient revenue to cover meal costs.
- Calculate cost per meal equivalent to ensure the costs to produce a meal does not exceed the revenue per meal equivalent.
- Calculate the cost as a percentage of revenue or operating ratios to analyze food cost or labor cost.
- Calculate break-even point to determine financial feasibility of a new program, making better financial decisions, and creating annual benchmark goals.
- Calculate and analyze the efficient monthly and annual use of inventory to control food and supply costs.
- Calculate meals per labor hour (MPLH) and apply the information to measure the productivity and production efficiency of the school nutrition program.
- Calculate staff turnover rate to determine how often positions must be filled.
- Calculate and analyze the time employees miss work in order to control labor cost.

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Calculate meal equivalents and apply the information to measure the performance of school nutrition programs.			
35 minutes	<ul style="list-style-type: none"> Lesson objectives Meal Equivalents (MEQ) 	<ul style="list-style-type: none"> Review Objectives Calculating Meal Equivalents 	Participant's Workbook
Objective: Calculate average daily participation (ADP) and apply the information for forecasting and making decisions pertaining to labor, food purchasing, and menu planning.			
15 minutes	ADP	Calculating ADP and ADP Rate	Participant's Workbook
Objective: Interpret and analyze revenues on a monthly report to monitor trends of the current period, the previous period, and year-to-date of the school nutrition program.			
15 minutes	Revenues	Classification of Revenues	Participant's Workbook
Objective: Interpret and analyze expenditures on a monthly report to monitor and identify monthly and annual trends.			
15 minutes	Expenditures	Classifying Expenditures	Participant's Workbook
Objective: Calculate revenue per meal equivalent to determine if there is sufficient revenue to cover meal costs.			
20 minutes	Revenue Per Meal Equivalent	Calculating Revenue Per Meal Equivalent	Participant's Workbook
Objective: Calculate cost per meal equivalent to ensure the costs to produce a meal does not exceed the revenue per meal equivalent.			
20 minutes	Cost Per Meal Equivalent	Calculating Cost Per Meal Equivalent	Participant's Workbook
Objective: Calculate the cost as a percentage of revenue or operating ratios to analyze food cost or labor cost.			
20 minutes	Cost as a Percentage of Revenue	Calculating Cost as a Percentage of Revenue	Participant's Workbook
Objective: Calculate break-even point to determine financial feasibility of a new program, make better financial decisions, and create annual benchmark goals.			
20 minutes	Break-Even Point	Calculating Break-Even Point	Participant's Workbook
Objective: Calculate and analyze the efficient monthly and annual use of inventory to control food and supply costs.			
20 minutes	Inventory Turnover Rate	Calculating Inventory Turnover Rate	Participant's Workbook
Objective: Calculate meals per labor hour and apply the information to measure the productivity and production efficiency of the school nutrition program.			
20 minutes	Meals Per Labor Hour (MPLH)	Calculating Meals Per Labor Hour	Participant's Workbook

Time Allowed	Topic	Activity	Materials
Objective: Calculate staff turnover rate to determine how often positions must be filled.			
15 minutes	Staff Turnover Rate	Calculating Staff Turnover Rate	Participant's Workbook
Objective: Calculate and analyze the time employees miss work in order to control labor cost.			
10 minutes	Absenteeism Rate	Calculating Absenteeism Rate	Participant's Workbook
15 minutes	<ul style="list-style-type: none"> • Wrap Up • KPI Interactive Spreadsheets • Conclusion – SMART Goals 		Participant's Workbook
Total: 4 hours			

Instructor's Note: Take a short stretch period after Sections 4 and 8. This is a good time to break the participants into new working groups.

Essential KPIs for School Nutrition Success

SHOW SLIDE: Essential Key Performance Indicators for School Nutrition Success

SAY: Welcome to Key Performance Indicators (KPIs), an Introduction to School Nutrition Leadership lesson for school nutrition directors. During this lesson we will look at the key performance indicators used in school nutrition programs. This lesson uses the July 1, 2018 reimbursement and USDA Food Values. Reimbursement Rate of \$3.33 and USDA Foods Value of \$0.235. Reimbursement rates are updated annually by the United States Department of Agriculture (USDA).

SHOW SLIDES: Lesson Objectives and Lesson Objectives, continued

DO: Review the objectives for this lesson.

Objective: Calculate meal equivalents and apply the information to measure the performance of school nutrition programs.

SHOW SLIDE: Meal Equivalents (MEQ)

SAY: In this section, we will discuss how to calculate meal equivalents (MEQ) and apply the information to measure the performance of your school nutrition program.

ASK: Who can tell me what meal equivalents are?

DO: Wait for participants to respond.

FEEDBACK:

Meal equivalents are the conversion of different meal services (i.e., breakfast, supper, and snacks) and nonprogram food sales to the equivalent of one federally reimbursable student lunch for comparison purposes.

ASK: Why would you want to calculate meal equivalents for your school?

DO: Wait for participants to respond.

FEEDBACK:

Meal equivalents are used to measure how well the program is operating.

ASK: How often would you calculate meal equivalents?

DO: Wait for participants to respond.

FEEDBACK:

It can be calculated weekly, monthly, and annually.

SHOW SLIDE: Meal Equivalents Conversion Chart

SAY: Let's look at calculating meal equivalents and how to apply the information to measure the performance of your school nutrition program. To calculate meal equivalents, you will need specific data.

ASK: Where do you think you can find the information for the meal equivalents?

DO: Wait for participants to respond.

FEEDBACK:

The meal count and sales data are electronically or manually entered at the point-of-sale system used by the school nutrition program. This data can be found in reports such as end of day sales reports, edit check worksheets, and/or deposit reports.

SAY: Look at the **Meal Equivalents** handout as we discuss how to calculate meal equivalents.

DO: Review the **Meal Equivalents** handout.

Meal Equivalents

Meal Service	Conversion Factor	Rationale
1 Lunch or 1 Supper (Student or Adult)	= 1.00	All student reimbursable lunches, student reimbursable suppers, and full-paid adult lunches are counted as one MEQ. If a student purchases more than one lunch on a given day, the second lunch is considered non-reimbursable and is reported as a nonprogram food sale. The category for reporting is determined by State agency requirements. Lunches eaten by school nutrition employees at no charge are considered "in-kind" meals and should not be counted as a meal equivalent.
1 Breakfast	= 0.67	The most common calculation for determining breakfast MEQs specifies that three breakfast meals count as two MEQs ($2/3 = 0.67$). However, it is important to note that the MEQ ratio used for calculating breakfast MEQs varies from state to state, and school nutrition administrators should check with their State agencies for guidance. Once a ratio is selected, it should remain consistent for the entire reporting period (year) for comparison and benchmarking purposes.
1 Snack	= 0.33	NSLP snacks are served to children and youth in afterschool care programs that are eligible for United States Department of Agriculture (USDA) reimbursement. While there are no current research studies to support the meal equivalency ratio, a survey of selected State agencies indicated most states use a 3-to-1 ratio of snacks to MEQs. Using this equivalency, snacks can be converted to MEQs as follows: MEQ = Number of snacks served X conversion factor ($1/3 = 0.33$).
Nonprogram Food Sales	= Dollar amount of nonprogram food sales / (current free lunch reimbursement rate + current USDA Food value [which changes annually])	<p>The MEQ calculations for all other school nutrition program categories are based on the annual Federal reimbursement rate for a free lunch plus the USDA Foods value.</p> <p style="text-align: center;"><u>Nonprogram Food Sales</u>¹ Free Lunch Reimbursement Rate² + USDA Foods Value³</p> <p>The same formula would apply for other school nutrition program events, such as catered meals or special school functions.</p>

¹ Nonprogram Food Sales: Food other than a reimbursable meal sold in a school nutrition program participating in a USDA Child Nutrition Program (i.e., NSLP, School Breakfast Program [SBP], etc.). This food is purchased using funds from the school food authority of the school, including food that is sold in competition with the school nutrition program.

² Free Lunch Reimbursement Rate: This rate changes annually. This rate can be found on the USDA Food and Nutrition Service (FNS) website.

³ Value of USDA Foods: This value changes annually. This value can be found on the USDA, FNS website. For states such as Kansas that receive cash in lieu of USDA Foods, please contact your State agency to determine what figure to use.

SAY: Some states may use different conversion factor numbers to figure meal equivalents. If you are not sure what your state uses, please contact your State agency. The formula is the same, the numbers may be different.

ASK: Do you have any questions about meal equivalents?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

ASK: Where did we get the information for the meal equivalents?

DO: Wait for participants to respond.

FEEDBACK:

The meal count and sales data at the point-of-sale system used by the school nutrition program. This data can be found in reports such as end of day sales reports, edit check worksheets, and/or deposit reports.

SAY: The conversion of all school nutrition program food sales to meal equivalents allows the calculation of three key performance indicators, revenue per meal equivalent, cost per meal equivalent, and Meals Per Labor Hour (MPLH).

SHOW SLIDE: *Activity: Calculating Meal Equivalents*

ACTIVITY: Calculating Meal Equivalents

Materials: Calculating Meal Equivalents worksheet

Time: 5 minutes

Instructions: Ask the participants to turn to the **Calculating Meal Equivalents** worksheet. Use the information given in the instructions to complete the activity.

DO: Ask the participants to complete the **Calculating Meal Equivalents** worksheet.

SAY: Let's complete an activity to see what you have learned. Look at the **Calculating Meal Equivalents** worksheet.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. When everyone has completed the activity, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Meal Equivalents

Given data:

The calculations are based on the reimbursement rates (3.33) and the USDA Foods value (0.2350) effective beginning July 1, 2018, for school year 2018–2019. Reimbursement rates should be updated annually because these amounts will change every July.

Meal Categories	Conversion Factors			Meal Equivalents
11,000 student reimbursable breakfasts	×	0.67	=	7,370
400 adult non-reimbursable breakfasts	×	0.67	=	268
24,000 student reimbursable lunches	×	1.00	=	24,000
700 adult lunches	×	1.00	=	700
8,000 student reimbursable suppers	×	1.00	=	8,000
20,000 afterschool snacks	×	0.33	=	6,600
\$9,000 dollars in nonprogram food sales	÷	$(\$3.33 + 0.2350)$ 3.565	=	2,525
Total Meal Equivalents				49,463

DO: When everyone has completed the activity, review the answers.

ASK: Do you have any questions about meal equivalents (MEQ) and how to calculate them?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

AVERAGE DAILY PARTICIPATION (ADP)

Objective: Calculate average daily participation (ADP) and apply the information for forecasting and making decisions pertaining to labor, food purchasing, and menu planning.

SHOW SLIDE: *Average Daily Participation*

SAY: In this section, we will calculate ADP and determine how to apply the information for forecasting and making decisions pertaining to labor, food purchasing, and menu planning.

ASK: What is ADP?

DO: Wait for participants to respond.

FEEDBACK:

ADP is the average number of student reimbursable meals served in a school nutrition program on a daily basis.

ASK: Why would you want to calculate ADP in your school?

DO: Wait for participants to respond.

SAY: ADP can assist you in forecasting and decision-making. Other benefits of calculating ADP will allow you to monitor and make informed decisions on labor requirements, food purchasing, and non-food purchasing projections.

Calculating ADP will strengthen the program's resources through cost control. The data you gather will allow you to establish participation goals and to create objectives for meeting those goals. When this data is collected over several years, it can help you identify trends and project future needs. ADP can be used to assess the popularity of menu options, evaluate productivity, and gauge customer satisfaction. ADP is not calculated on supper because that meal is outside the school day.

ASK: How often would you calculate ADP?

DO: Wait for participants to respond.

FEEDBACK:

ADP can be calculated daily, weekly, monthly, or as often as needed.

SHOW SLIDE: ADP Calculations

SAY: To calculate ADP, divide the number of student meals served during the month by the number of operating days in that month. The meal count data is usually captured electronically or manually at the point-of-sale system.

To determine the ADP for breakfast and lunch, you will need the meal count for each meal. The formula for calculating the different meals are as follows:

$$\text{ADP Breakfast} = \frac{\text{Number of Breakfasts Served in a Month}}{\text{Number of Operating Days in That Month}}$$

$$\text{ADP Lunch} = \frac{\text{Number of Lunches Served in a Month}}{\text{Number of Operating Days in That Month}}$$

DO: Have the formulas on a piece of chart paper. Give the participants 2 minutes to calculate the ADP for breakfast and lunch.

SAY: Let's look at an example. 123 School District in a month with 15 operating days served:

- 7,563 reimbursable student breakfasts,
- 15,467 reimbursable student lunches.
- Calculate the ADP for breakfast and lunch.

DO: Allow participants 2 minutes to calculate the answers.

ASK: Would someone like to share their answer for breakfast? Would someone like to share their answer for lunch?

FEEDBACK:

- To calculate ADP for breakfast, divide 7,563 by 15, and the answer is 504.2 or 504.
- To calculate ADP for lunch, divide 15,467 by 15, and the answer is 1031.1 or 1031.

ASK: Are there any questions on calculating ADP before we move on to ADP rate?

DO: Answer questions to the best of your ability.

SAY: ADP rate is the ratio of students eating a school meal to the average number of students attending school. The daily attendance comes from the school office. USDA calculates ADP rates based on average daily attendance rather than enrollment. Calculating ADP rates this way is considered fairer to schools because the calculation does not include students who are absent or do not eat lunch or breakfast. To calculate average daily attendance, obtain the number from the school office and subtract the number of students who do not have access to the meal service, such as half-day kindergarten students.

ASK: Can someone tell me why you do not calculate the ADP rate for supper?

FEEDBACK:

Supper is served outside of the school day; therefore, attendance does not apply to the supper meal.

SHOW SLIDE: ADP Rate

SAY: To calculate the a ADP rates, use the following formulas:

$$\text{ADP Rate Breakfast} = \frac{\text{Breakfast ADP}}{\text{Average Daily Attendance}}$$

$$\text{ADP Rate Lunch} = \frac{\text{Lunch ADP}}{\text{Average Daily Attendance}}$$

Using the previous example, let's continue by calculating the ADP rate for 123 School District. For the current reporting period, an average of 3,500 students attended school in the district on a daily basis. (The information was obtained from the school district office.) However, 100 students did not have access to lunch because they were half-day kindergarten students, and an average of 156 students were absent in the district the whole day.

An average of 504 students ate a reimbursable breakfast and an average of 1031 students ate a reimbursable lunch on a daily basis. Using the numbers from the previous activity, calculate the ADP rate for 123 School District.

$$\text{ADP Rate Breakfast} = \frac{504}{3,500} \times 100 = 0.144 \text{ or } 14\%$$

$$\text{ADP Rate Lunch} = \frac{1031}{(3,500 - 100)} \times 100 = 0.3032 \text{ or } 30\%$$

ASK: How can ADP and ADP rate help you make decisions in your school nutrition program?

FEEDBACK:

ADP can be used as a major forecasting tool. It can be used in the following ways:

- Prevent waste in excess labor hours and overproduction of food
- Monitor participation trends over time
- Monitor customer satisfaction and address customer concerns
- Identify opportunities for increasing meal participation
- Determine labor needs and assignments
- Create food production schedules
- Evaluate menu items
- Measure program growth

ASK: Are there any questions on calculating ADP and ADP rate?

DO: Answer questions to the best of your ability.

SHOW SLIDE: *Activity: Calculating ADP and ADP Rate*

ACTIVITY: Calculating Average Daily Participation and ADP Rate

Materials: Calculating Average Daily Participation worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Average Daily Participation** worksheet in the Participant's Workbook.

SAY: In the next activity, you will use the information given to calculate ADP and ADP rate for ABC School District using the **Calculating Average Daily Participation** worksheet. ABC School District served 11,400 reimbursable student breakfasts and 24,700 reimbursable student lunches during a month with 21 operating days. Using the formulas just discussed, calculate the ADP for breakfast and lunch. Then, calculate the ADP rate for breakfast and lunch.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. At the end of the 5 minutes, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Average Daily Participation

Instructions: ABC School District served 11,400 reimbursable student breakfasts and 24,700 reimbursable student lunches during a month with 21 operating days. Using the formulas just discussed, calculate the ADP for breakfast and lunch and the ADP rate for breakfast and lunch.

$$\text{ADP Breakfast} = \frac{11,400}{21} = \mathbf{542.8 \text{ or } 543}$$

$$\text{ADP Lunch} = \frac{24,700}{21} = \mathbf{1,176.1 \text{ or } 1,176}$$

For the current reporting period, an average of 2,200 students attended school in the district on a daily basis. (The information was obtained from the school district office.) However, 100 students did not have access to lunch because they were half-day kindergarten students, and 147 students were absent in the district the whole day.

$$\text{ADP Rate Breakfast} = \frac{543}{2,200} \times 100 = \mathbf{0.2468 \text{ or } 25\%}$$

$$\text{ADP Rate Lunch} = \frac{1,176}{(2,200 - 100)} \times 100 = \mathbf{0.56 \text{ or } 56\%}$$

DO: When everyone has completed the activity, review the answers.

ASK: What about the 147 students that were absent. Why are they not subtracted from the 2,200 students in attendance?

DO: Wait for participants to respond.

FEEDBACK:

The 147 absent students are not counted in attendance.

ASK: Do you have any questions about ADP, ADP rate, and how to calculate them?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

REVENUES

Objective: Interpret and analyze revenues on a monthly report to monitor trends of the current period, the previous period, and year-to-date of the school nutrition program.

SHOW SLIDE: Revenues

SAY: Now we will discuss how to interpret and analyze revenues on a monthly report. It is important to monitor financial trends for the current period, the previous period, and year-to-date of the school nutrition program to determine if the school nutrition program is making a profit, losing money, or breaking even.

SNP revenues are all monies received by or accruing to the nonprofit foodservice account, and include, but are not limited to, the potential sources found in the **Revenue Terms and Definitions** handout. Some of these categories differ from state to state. Check with your State agency for guidance.

DO: Review the **Revenue Terms and Definitions** handout. Make sure everyone knows and understands the terms and definitions.

Revenue Terms and Definitions

Terms	Definitions
Federal Sources	Payments received from Federal funds for reimbursable meals, afterschool snacks, and suppers, as well as the value of USDA Foods received, cash received in lieu of USDA Foods, Federal grants, and funds for other Federal nutrition programs.
State Sources	Funds received by the school nutrition program from the State government (i.e., "State matching" funds).
Local Sources	Funds received from sources such as local government aid, grants, or contributions. Student and adult meal sales, contract meal sales, other food sales, and interest on bank deposits are considered local sources. This does not include local funds transferred into a school nutrition program that must be paid back to the school district (i.e., loans to a school nutrition program).
Student Meal Sales	Funds identified as revenue received from the sale of reimbursable meals to students. This includes monies received from full-paying and reduced price students.
Adult Meal Sales	All revenue received from the sale of meals to adults. Meals sold to school employees, parents, and guests of the school district should be included in this category.
Contract Meal Sales	Funds received from the sale of meals prepared/served for an agreed price to an agency, organization, business, or group who have entered into a contractual agreement with the school nutrition program.
Nonprogram Food Sales	Funds received from food sales such as à la carte, extra meal components (milk), snacks, and special school or catered meals. Some states and districts record adult meal sales in this category.
Miscellaneous/Other Revenue	Other revenue not classified or included elsewhere, such as rebates, sale of surplus equipment, lease or rental of equipment, grant funds (i.e., "No Kid Hungry," Dairy Council breakfast grants, Federal equipment grants, etc.), and concession sales.
Interest	Money earned on bank deposits, investments, etc.
Fund Transfer-In	Funds transferred to the school nutrition program from other Board of Education funds. (This does not include "loans to a school nutrition program" that must be repaid to the district.)

SAY: The management of revenue is critical to the financial stability of a SNP. A successful school nutrition director must ensure there is enough revenue to meet expenditure obligations. According to Federal guidelines, a SNP cannot show a deficit (negative ending balance). Therefore, the goal of a SNP should be to end each fiscal year with a positive (minimum of zero) balance.

ASK: How often should you calculate the revenue of your SNP?

DO: Allow time for participants to respond.

FEEDBACK:

Revenues should be calculated at least once a month.

ASK: Does anyone know where to find the information?

DO: Allow time for participants to respond.

FEEDBACK:

Your business manager or accountant can supply you with the revenue information.

SAY: Revenues are listed on a revenue and expenditures statement, sometimes called an income statement or a statement of activities. This report is usually prepared at the end of the month by the school nutrition office or the school business office.

DO: Review the **Statement of Activities** handout with the participants.

SAY: Look at the **Statement of Activities** handout. There are four types of financial information on the **Statement of Activities** (Revenue and Expenditures).

- Total revenue available to the program by source
- Total expenditures by category
- Net excess/deficit to the program for the period of the statement
- Comparison of current month with previous month's financial information and year-to-date information

Statement of Activities

School Nutrition Program Ending _____ (Month) (Year)

Revenue Source	Current Month	Previous Month	YTD
Local Sources			
Student Meal Sales	\$24,978	\$23,025	\$96,150
Adult Meal Sales	2,376	2,175	9,102
Other Food Sales	11,326	10,785	44,222
Contract Meals	1,575	1,560	6,250
Interest	260	255	1,030
State Sources	18,831	0	18,831
Federal Sources (includes USDA Foods value)	186,639	182,220	737,718
Miscellaneous	0	8,010	8,010
Fund Transfer-In	0	0	0
Total Revenue	\$245,985	\$228,030	\$921,313
Expenditures	Current Month	Previous Month	YTD
Salaries and Wages	\$65,875	\$63,900	\$259,550
Employee Benefits	28,975	25,364	108,678
Purchased Services	375	326	1,402
Property Services	305	280	1,170
Purchased Food/USDA Foods	96,190	90,183	372,746
Supplies	24,750	21,360	92,220
Miscellaneous	625	0	950
Capital Assets	0	55,000	70,000
Indirect Costs	5,835	5,830	23,330
Fund Transfer-Out	0	0	0
Total Expenditures	\$222,930	\$262,243	\$930,046
Net Excess/Deficit	\$23,055	\$(34,213)	\$(8,733)

Notes:

- (1) School nutrition program directors should modify the Statement of Activities to meet the local and State requirements.
- (2) The dollar amounts shown in this statement are for a hypothetical school district and are illustrative only.

ASK: Comparing the current months' revenue with the previous months', what are some major differences that would cause the different revenue totals?

DO: Allow time for participants to respond.

FEEDBACK:

- The current month has \$18,831 in State revenues not found in the previous month.
- The previous month has \$8,010 in miscellaneous revenues not found in the current month.

SHOW SLIDE: *Activity: Classification of Revenues*

ACTIVITY: Classification of Revenues

Materials: Classification of Revenues worksheet

Time: 5 minutes

Instructions: Ask participants to turn to the **Classification of Revenues** worksheet. Link the revenue category described in Column A with the best source provided in Column B. Sources in Column B may be used more than one time.

SAY: Let's do an activity to see what you have learned. Turn to the **Classification of Revenues** worksheet in the Participant's Workbook.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. At the end of the 5 minutes, go over the answers.

Classification of Revenues

Instructions: Link the revenue category described in Column A with the best source provided in Column B. Sources in Column B may be used more than one time.

Column A	Column B
Revenue Received	Revenue Source
<u> A </u> Money earned on bank deposits and investments	A. Local
<u> C </u> Monetary value of food donated to schools by USDA	B. State
<u> D </u> Cash rebates from food companies received by the school nutrition program after the fiscal year has closed	C. Federal
<u> A </u> Revenue received from students for the purchase of nonprogram food items	D. Miscellaneous
<u>A/B/C</u> Grant money awarded to school districts who submit successful proposals for special projects and activities	E. Fund Transfer
<u> D </u> Money received from the sale of surplus equipment	
<u> B </u> Revenues paid to school districts by the State for eligible breakfast meals	
<u> C </u> Cash payment received for free meals that meet Federal standards and are served to eligible students	
<u> A </u> Revenue received from contract meals provided to a charter school	
<u> E </u> Funds transferred to the school nutrition program from the school district's general fund	

SAY: Let's go over the answers to see how well you did.

DO: Ask for volunteers to give their answer to each revenue item.

SAY: The KPI and revenues, can be used to monitor trends for each individual revenue line item for the current period, the previous period, and the year-to-date. Trends and directions for improvement may be identified that will assist you in making better financial decisions.

Total school nutrition program revenues should meet or exceed total expenditures, thus making a program self-supporting. School nutrition programs are usually expected to be self-supporting and not requiring budget transfers from the school district.

ASK: Does anyone know what can influence the amount of revenue you receive?

DO: Allow time for participants to respond.

FEEDBACK:

- Quality of the school nutrition program
- Federal reimbursement (the percentage of students eligible for free and reduced price meals)
- Average daily participation (ADP)
- Nonprogram (à la carte) food sales
- District policies (e.g., open/closed campus, adequate meal periods)
- Meal pricing
- General ledger

ASK: Do you have any questions about the KPIs, revenues, when revenues should be calculated, where to find the information, and how the information can be used?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

EXPENDITURES

Objective: Interpret and analyze expenditures on a monthly report to monitor and identify monthly and annual trends.

SHOW SLIDE: *Expenditures*

SAY: Now we will discuss how to interpret and analyze expenditures on a monthly report. It is important to monitor expenditures to identify monthly and annual trends. Expenditures are those allowable costs that can be identified specifically with the production and service of meals to school children. A list of expenditure categories for a SNP can be found in the **Expenditure Terms and Definitions** handout. Some of these categories differ from state to state. Check with your State agency for guidance.

DO: Review the **Expenditure Terms and Definitions** handout. Make sure everyone knows and understands the terms and definitions.

Expenditure Terms and Definitions

Major Expenditure Categories	
Salaries and Wages	Expenses that include regular, extra time, overtime, vacation, severance, holiday, substitute, administrative salaries, and other salaries and wages paid from school nutrition program funds.
Employee Benefits	Expenses that include social security, health/life insurance, workers' compensation, and unemployment insurance. This category may include employee meals, job-related medical expenses not covered by insurance, and other expenses, such as uniforms.
Purchased Food	The amount expended for the purchase of all food sold in the school nutrition program. This also includes charges for processing USDA Foods from bulk or raw form to ready-to-use end products and the cost of USDA Foods delivery fees to school districts. (Some states may require USDA Foods processing fees under purchased services).
USDA Foods	Nutritious foods produced by American agricultural producers and purchased by USDA for distribution in Federal feeding programs including the National School Lunch Program (NSLP).
Paper Goods and Cleaning Supplies	The cost of disposable paper goods and supplies, such as dish machine and other chemicals used for production and service of food at the school site.
Other Expenditure Categories	
General Operating Supplies	The cost of general supplies necessary for the operation of the school nutrition program, including office supplies.
Purchased Services	Fees expended for professional and technical services, including accounting, legal advice, and training. Architects, consultants, computer specialist, foodservice management fees, and other similar services are also included. (Some states may require USDA Foods processing fees under purchased food.)
Maintenance	Property service, such as maintenance and upkeep of property. This includes energy costs, payments to other agencies for repairs and maintenance of school nutrition program equipment, and repair or upkeep of cafeteria facilities. (These may be a direct cost or an indirect cost, but cannot be both.)
Miscellaneous	Expenditures not classified or included elsewhere.
Capital Assets	Costs for acquiring fixed assets, such as initial equipment or replacement of equipment. Expenditures for technology hardware and software and vehicles are also recorded here. Unit cost (capitalization threshold) and useful life may be specified by the business entity.

Non-Capitalized Assets	Equipment under the capital threshold, such as small wares.
Indirect Cost	General school district overhead attributable to the SNP, including school nutrition activities and support services provided by other district departments that are recovered through an approved cost allocation plan.
Fund Transfer-Out	Funds transferred to another district fund and/or repayment of loans to the district.

SAY: Analyzing expenditures can provide valuable information. For example, significant changes in cost categories are a red flag to monitor spending in a specific area. Deviations from goals (budget) indicate the need for further investigation. Other reasons to monitor expenditures are to identify transaction/accounting errors/discrepancies and to identify monthly and annual trends.

ASK: How often should you calculate the expenditures of your SNP?

DO: Allow time for participants to respond.

FEEDBACK:

Expenditures should be calculated at least once a month.

ASK: Does anyone know where to find the information?

DO: Allow time for participants to respond.

FEEDBACK:

Your business manager or accountant will be able to supply you with all of the expenditure information.

SAY: Expenditures are listed on a revenue and expenditures statement, sometimes called an income statement or a statement of activities. This report is usually prepared at the end of the month by the school nutrition office or the school business office. Let's look at an example of a Statement of Activities report.

DO: Refer back to the **Statement of Activities** handout.

SAY: Look at the **Statement of Activities** handout. There are four types of financial information on the Statement of Activities (Revenue and Expenditures).

- Total revenue available to the program by source
- Total expenditures by category
- Net gain/loss to the program for the period of the statement
- Comparison of current month with previous month's financial information and year-to-date information

Statement of Activities

School Nutrition Program Ending _____ (Month) (Year)

Revenue Source	Current Month	Previous Month	YTD
Local Sources			
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Federal Sources (includes USDA Foods value)	186,639	182,220	737,718
Miscellaneous	0	8,010	8,010
Fund Transfer-In	0	0	0
Total Revenue	\$245,985	\$228,030	\$921,313
Expenditures	Current Month	Previous Month	YTD
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Purchased Food/USDA Foods	96,190	90,183	372,746
Supplies	24,750	21,360	92,220
Miscellaneous	625	0	950
Capital Assets	0	55,000	70,000
Indirect Costs	5,835	5,830	23,330
Fund Transfer-Out	0	0	0
Total Expenditures	\$222,930	\$262,243	\$930,046
Net Excess/Deficit	\$23,055	\$(34,213)	\$(8,733)

Notes:

- (1) School Nutrition Program directors should modify the Statement of Activities to meet the local and State requirements.
- (2) The dollar amounts shown in this statement are for a hypothetical school district and are illustrative only.

ASK: Compare the current months' expenditures with the previous months'. What are some differences that could cause the difference in expenditures?

DO: Allow time for participants to respond.

FEEDBACK:

- In the current month there, was a \$625 miscellaneous expense
- In the current month there, was an increase in the Purchased Food/USDA Foods by approximately \$6,000
- In the previous month there, was a purchase of capital equipment of \$55,000

SHOW SLIDE: *Activity: Classifying Expenditures*

ACTIVITY: Classifying Expenditures

Materials: **Classifying Expenditures** worksheet

Time: 5 minutes

Instructions: Ask the participants to turn to the **Classifying Expenditures** worksheet. Link the revenue category described in Column A with the best source provided in Column B. Sources in Column B may be used more than one time.

SAY: Let's do an activity to see what you have learned about expenditures. Turn to the **Classifying Expenditures** worksheet in the Participant's Workbook.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. At the end of the 5 minutes, go over the answers. Ask for volunteers to give their answer to each expenditure item.

Classifying Expenditures

Instructions: Link the revenue category described in Column A with the best source provided in Column B. Sources in Column B may be used more than one time.

Column A	Column B
Expenditures	Category
<u> C </u> Cost of supplies necessary for the operation of the school nutrition program (SNP)	A. Miscellaneous
<u> F </u> Purchased foods with a commodity letter of credit and cash in lieu of	B. Maintenance
<u> A </u> Expenditures not classified or included elsewhere	C. General Operating Supplies
<u> G </u> Expenses that include social security, health/life insurance, workers' compensation, and unemployment insurance	D. Capital Assets
<u> H </u> Equipment under the capital threshold, such as small wares	E. Paper Goods and Cleaning Supplies
<u> E </u> Cost of disposable paper goods and other supplies, such as chemicals used for production and service of food	F. USDA Foods
<u> I </u> Amount expended for the purchase of all food sold in the SNP	G. Employee Benefits
<u> B </u> Property service, such as maintenance and upkeep of property	H. Non-Capitalized Assets
<u> D </u> Costs for acquiring fixed assets	I. Purchased Foods

SAY: As shown in the **Statement of Activity** report, trends for each individual expenditure line item should be monitored for the current period, the previous period, and the year-to-date. Trends and directions for improvement can be identified so that effective financial decisions are made.

Total SNP revenues should meet or exceed total expenditures, thus making a program self-supporting. The goal for labor cost plus benefits should be kept at or below 40% of total revenues. The following are not industry standards but some benchmarks observed in the School Lunch and Breakfast Cost Study-II Final Report (2008):

- Food costs = 38% of total cost
- Labor costs = 46% of total cost
- Other costs = 16% of total cost

ASK: Do you have any questions about the key performance indicator, expenditures, when expenditures should be calculated, where to find the information, and how the information can be used?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

Instructor's Note: *Take a short stretch break and divide the participants into groups.*

REVENUE PER MEAL EQUIVALENT

Objective: Calculate revenue per meal equivalent to determine if there is sufficient revenue to cover meal costs.

SHOW SLIDE: *Revenue Per Meal Equivalent*

SAY: Revenue per meal equivalent is a revenue management tool to help manage and analyze trends and project revenues. It is important to calculate and compare revenue per meal equivalent to costs per meal equivalent to ensure there is sufficient revenue to cover meal costs. This calculation simplifies the analysis of revenue by source. Trends and directions for improvement can be identified so that better financial decisions are made.

ASK: How often should you calculate revenue per meal equivalent?

DO: Allow time for participants to respond.

FEEDBACK:

Revenue per meal equivalent can be calculated weekly or monthly.

SAY: Let's look at how you calculate revenue per meal equivalent and complete an activity. The equation is:

$$\text{Revenue} \div \text{Total Meal Equivalents (MEQs)} = \text{Revenue Per Meal Equivalent}$$

SHOW SLIDE: *Activity: Calculating Revenue Per Meal Equivalent*

ACTIVITY: Calculating Revenue Per Meal Equivalent

Materials: Calculating Revenue Per Meal Equivalent worksheet

Time: 5 minutes

Instructions: Turn to the **Calculating Revenue Per Meal Equivalent** worksheet in the Participant's Workbook. Use the data given to calculate the revenue per meal equivalent to determine if the school district is making a profit, breaking even, or losing money and the amount. Carry out the answers 4 places behind the decimal. Walk around to help anyone that may have questions or needs help. At the end of the 5 minutes, go over the answers. Explain how to calculate the answers if someone does not understand.

SAY: Turn to the **Calculating Revenue Per Meal Equivalent** worksheet in the Participant's Workbook.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or needs help. At the end of the 5 minutes, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Revenue Per Meal Equivalent

Instructions: Anywhere School District is spending \$2.87 on each meal served. Calculate the revenue per meal equivalent and determine if the school district is making a profit, breaking even, or losing money. Carry out the answers 4 places behind the decimal.

Revenue Source	Revenues	÷	Total MEQs	=	Revenue per Meal Equivalent
Student Meal Sales	\$18,250	÷	49,463	=	\$0.3690
Adult Meal Sales	\$1,250	÷	49,463	=	\$0.0253
Nonprogram Food Sales	\$5,140	÷	49,463	=	\$0.1039
Contract Food Sales	\$640	÷	49,463	=	\$0.0129
Federal Reimbursement	\$96,740	÷	49,463	=	\$1.9558
USDA Foods	\$7,180	÷	49,463	=	\$0.1452
State Reimbursement	\$850	÷	49,463	=	\$0.0172
Interest	\$140	÷	49,463	=	\$0.0028
Miscellaneous	\$260	÷	49,463	=	\$0.0053
Totals	\$130,450	÷	49,463	=	\$2.6373

ASK: Is Anywhere School District making a profit, breaking even, or losing money?

DO: Allow time for participants to respond.

FEEDBACK:

The school district is losing money—about **\$0.23** per MEQ.

SAY: You will need to obtain revenues by source and meal count data to calculate revenue per meal equivalent. Meal count data is usually captured electronically or manually at the point-of-sale system utilized by school nutrition programs.

Revenue is found on the revenue and expenditure statement, or you can obtain the information from the business office. The revenue and expenditure statement is sometimes called an income statement or statement of activities. This report identifies revenues, expenditures, and fund balance for the current period, the previous period, and year-to-date. It is usually prepared at the end of the month by the school nutrition office or the school business office.

The best way to use revenue per meal equivalent is to compare it to the cost per meal equivalent to ensure that costs are lower than revenues and the SNP is self-supporting. This KPI can be used to determine areas where revenue can be increased. You can also make better financial decisions, such as whether to increase prices (especially for adult meals, contracted sales, and nonprogram food sales). Revenue per meal equivalent can be compared to budget projections, to the previous month's revenue per meal equivalent, and to the previous year's figures. Trends and directions for improvement can be identified so that effective financial decisions are made. Revenue per meal equivalent should meet or exceed the Federal reimbursement rate for a meal (breakfast, lunch, snack, or supper).

The following is a list of some factors that can influence revenue per meal equivalent:

- ADP
- Average daily attendance
- Pricing of meals and à la carte items
- Use of USDA Foods
- The percentage of students eligible for free and reduced price meals
- Open or closed campus
- Method of foodservice delivery

ASK: Do you have any questions about revenue per meal equivalent and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

COST PER MEAL EQUIVALENT

Objective: Calculate cost per meal equivalent to ensure the costs to produce a meal does not exceed the revenue per meal equivalent.

SHOW SLIDE: Cost Per Meal Equivalent

SAY: Now we are going to look at cost per meal equivalent and how to calculate it. Cost per meal equivalent is the dollar amount utilized by a school nutrition program to produce one meal equivalent. It is essential to calculate this key performance indicator (KPI) to measure the performance of the school nutrition program. When the cost to produce a meal exceeds the revenue per meal equivalent, action must be taken.

ASK: How often should you calculate revenue per meal equivalent?

DO: Allow time for participants to respond.

FEEDBACK:

Cost per meal equivalent can be calculated weekly or monthly.

SAY: Let's look at how you calculate cost per meal equivalent and complete an activity. The equation is:

$$\text{Expenditure} \div \text{Total Meal Equivalents (MEQ)} = \text{Cost per meal equivalent}$$

SHOW SLIDE: Activity: Calculating Cost Per Meal Equivalent

ACTIVITY: Calculating Cost Per Meal Equivalent

Materials: Calculating Cost Per Meal Equivalent worksheet

Time: 5 minutes

Instructions: Turn to the **Calculating Cost Per Meal Equivalent** worksheet in the Participant's Workbook. Use the information and the instructions and table, calculate the cost per meal equivalent to determine if the school district is making a profit, breaking even, or losing money. Carry the answers out 4 places behind the decimal.

SAY: Turn to the **Calculating Cost Per Meal Equivalent** worksheet in the Participant's Workbook.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. At the end of the 5 minutes, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Cost Per Meal Equivalent

Instructions: Anywhere School District receives \$2.64 per MEQ. Using the information in the table, calculate the cost per meal equivalent to determine if the school district is making a profit, breaking even, or losing money. Carry the answers out 4 places behind the decimal.

Expenditure (Cost) Source	Costs/ Expenditures	÷	Total MEQs	=	Cost Per Meal Equivalent
Salaries and Wages	\$40,000	÷	49,463	=	0.8087
Employee Benefits	\$15,000	÷	49,463	=	0.3033
Purchased Food	\$40,000	÷	49,463	=	0.8087
USDA Foods	\$12,000	÷	49,463	=	0.2426
Food Production/Cleaning Supplies	\$22,000	÷	49,463	=	0.4448
Total Expenditures	\$129,000	÷	49,463	=	2.6080

ASK: Is Anywhere School District making a profit, breaking even, or losing money? If so, by how much?

DO: Allow time for participants to respond.

FEEDBACK:

The school district is making a profit of **\$0.03** per meal equivalent.

SAY: You will need to obtain expenditures by source and meal count data to calculate cost per meal equivalent. Meal count data is usually captured electronically or manually at the point-of-sale system utilized by school nutrition programs.

The expenditure information can be found on the revenue and expenditure statement or you can obtain the information from the business office. The revenue and expenditure statement is sometimes called an income statement or statement of activities. This report identifies revenues, expenditures, and fund balance for the current period, the previous period, and year-to-date. It is usually prepared at the end of the month by the school nutrition office or the school business office.

When expenditures are categorized, each cost (e.g., food, labor, supplies, and other costs) can be calculated per meal equivalent. Cost per meal equivalent can be compared to budget projections, to the previous month's cost per meal equivalent, and to the previous year's figures. Trends and directions for improvement can be identified so that better financial decisions are made. Cost per meal equivalent should be compared to revenue per meal equivalent to ensure costs are lower than revenues to ensure a SNP is self-supporting.

The following is a list of some factors that can influence cost per meal equivalent:

- Type of meal preparation system
- Availability of labor
- School "start-up" expenses
- Seasonal price changes (e.g., fresh fruit and other market driven items)
- One-time purchases (e.g., equipment)
- Unplanned expenses (e.g., repair bills, food loss due to power failure)

ASK: Do you have any questions about cost per meal equivalent and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

COST AS A PERCENTAGE OF REVENUE

Objective: Calculate cost as a percentage of revenue or operating ratios to analyze food cost or labor cost.

SHOW SLIDE: *Cost as a Percentage of Revenue*

SAY: Now, we are going to look at cost as a percentage of revenue, often referred to as operating ratios, and how it relates expenses to revenue. When calculating operating ratios, cost is usually analyzed in terms of food cost or labor cost.

Operating ratios help school nutrition directors evaluate and monitor their operations. These ratios are useful to management, because they allow comparison of actual results against anticipated operational plans. Some examples are food cost percentage and labor cost percentage.

- Food cost percentage: school nutrition directors rely on this ratio to determine whether expenditures for purchased food are reasonable and consistent with benchmarks.
- Labor cost percentage: This percentage is useful to school nutrition directors as a benchmark for making comparisons from school-to-school within a district, or from district-to-district within a State or region.

We previously learned that the total SNP revenues should meet or exceed total expenditures, thus making a program self-supporting. The goal for labor cost plus benefits should be kept at or below 40% of total revenues. The following are not industry standards but some benchmarks observed in the School Lunch and Breakfast Cost Study-II Final Report (2008):

- Food costs = 38% of total cost
- Labor costs = 46% of total cost
- Other costs = 16% of total cost

ASK: How often should these percentages be calculated?

DO: Allow time for participants to respond.

FEEDBACK:

They should be calculated monthly.

SHOW SLIDE: Cost as a Percentage of Revenue Calculations

SAY: Let's look at how food cost percentage is calculated.

A school nutrition program has a total revenue of \$130,450 for the month of October and a food costs of \$52,000 for the same month. Using the following formula, we can determine the relationship of food cost to total revenue:

$$\frac{\text{Cost of Purchased Food}}{\text{Total Revenue}} = \text{Food Cost Percentage}$$

$$\frac{\$52,000}{130,450} \times 100 = 0.3986 \text{ or } 40\%$$

This operation has a 40% food cost in relation to total revenue for the month. That means that \$0.40 of every revenue dollar was spent for food in the month of October.

We can look at labor costs the same way. The school district has a payroll, including benefits and other related labor expenses, of \$55,000. Using the formula, we can determine the relationship of labor cost to total revenue:

$$\frac{\text{Payroll, Benefits, and Other Related Labor Expenses}}{\text{Total Revenue}} = \text{Labor Cost Percentage}$$

$$\frac{\$55,000}{\$130,450} \times 100 = 0.4216 \text{ or } 42\%$$

This tells the school nutrition director that \$0.42 of every revenue dollar was spent for labor and benefits for the month of October.

ASK: Does anyone have any questions concerning how to calculate these percentages?

DO: Allow time for participants to respond.

SAY: The revenue data can be found on the statement of activities (also known as the revenue and expenditure statement or income statement). The Statement of Activities Report identifies revenues, expenditures, and fund balance for the current period, the previous period, and year-to-date. It is usually prepared at the end of the month by the school nutrition office or school business office.

Cost as a percentage of revenue is an important tool in annual budget development and monthly operations monitoring. When expenditures are calculated as a percentage of total revenue, they can be compared to budget projections, to the previous month's percentages, to a previous year's figures, to industry standards, and to similar schools for the same period. Trends and directions for improvement can be identified so that better financial decisions are made. All expenditures can be calculated as a percentage of total revenue.

SHOW SLIDE: Activity: Calculating Cost as a Percentage of Revenue

ACTIVITY: Calculating Cost as a Percentage of Revenue

Materials: Calculating Cost as a Percentage of Revenue worksheet

Time: 5 minutes

Instructions: Turn to the **Calculating Cost as a Percentage of Revenue** worksheet in the Participant's Workbook. Use the information and the instructions and table to calculate the cost as a percentage of revenue.

ASK: Are you ready for an activity?

DO: Read the instructions. Give participants about 5 minutes to complete the activity. At the end of the 5 minutes, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Cost as a Percentage of Revenue

Instructions: Using the information in the table, calculate the cost as a percentage of revenue for Anywhere School District to determine how the school district is doing. Carry the answers out 4 places behind the decimal. Take about 5 minutes to complete the activity.

Expenditure (Cost) Source	Costs/ Expenditures	÷	Revenue	×	100	=	Percentage of Revenue
Salaries and Wages	\$40,000	÷	\$130,450	×	100	=	31%
Employee Benefits	\$15,000	÷	\$130,450	×	100	=	11.5%
Purchased Food	\$40,000	÷	\$130,450	×	100	=	31%
USDA Foods	\$12,000	÷	\$130,450	×	100	=	9.2%
Food Production/Cleaning Supplies	\$22,000	÷	\$130,450	×	100	=	16.9%
Total Expenditures	\$129,000	÷	\$130,450	×	100	=	98.9%

ASK: If a goal of no more than 40% labor costs (including benefits) to revenue is recommended, how is Anywhere School District doing on their percentage of revenue?

FEEDBACK:

If you just include salaries and wages, they are doing fine. However, when you include employee benefits, the percentage is 42.5 percent. The school nutrition director of this school district might want to either re-examine staffing or see if they can increase participation or raise revenue.

SAY: Let's look at the **Factors That Influence Cost Percentage** handout. This handout lists some of the things that can affect food and labor cost percentage.

Factors That Influence Cost Percentages

There are many factors that can influence costs percentage to revenue. A higher than expected food costs percentage may occur due to:

- Incorrect portion control
- Overproduction and food waste
- Inaccurate inventories due to counting or valuation errors
- Not fully utilizing USDA Foods allotments
- Theft
- High food costs
- Inefficient menu planning
- Use of pre-prepared and packaged foods versus “scratch” ingredients
- Inaccurate meal counting and claiming
- Unexpected expenses (such as fuel surcharges) due to the differences between states and/or regions

A lower than expected food cost percentage should be investigated. While it may mean cost control methods are working better than expected, it could also indicate:

- Inaccurate inventories
- Inaccurate reporting
- Inadequate portion sizes
- Unpaid invoices

A higher than expected labor cost percentage may occur due to:

- Differences in labor expenditures between states and/or regions
- Excess labor hours being allocated for the number of meals served

A lower than expected labor cost percentage may occur due to:

- Inadequate staffing, which leads to poor service

ASK: Do you have any questions about cost as a percentage of revenue and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

BREAK-EVEN POINT

Objective: Calculate break-even point to determine financial feasibility of a new program, make better financial decisions, and create annual benchmark goals.

SHOW SLIDE: Break-Even Point

SAY: Our next section is on break-even point. We will cover calculating break-even point, how to apply the information to determine financial feasibility of a new program, make better financial decisions, and create annual benchmark goals for the school nutrition program.

ASK: Can someone tell me what break-even point is?

DO: Wait for participants to respond.

FEEDBACK:

Break-even point (BEP) is the point at which revenues and expenditures are equal. BEP is the amount of revenue (sales or income) needed to cover fixed and variable costs. When revenues exceed expenditures, excess revenue or an increase in fund balance occurs. When expenditures exceed revenues, a loss or a decrease in fund balance occurs.

ASK: Why would you want to calculate break-even point in your school?

DO: Wait for participants to respond.

FEEDBACK:

Knowing the status of the SNP regarding the BEP allows a school nutrition director to gauge whether the program is self-sufficient and to make changes as needed. The BEP can be used to determine if starting an initiative (i.e., a supper program, an afterschool snack program, etc.) will be financially feasible.

ASK: How often should you calculate break-even point?

DO: Wait for participants to respond.

FEEDBACK:

Break-even point can be calculated monthly and annually.

SAY: The information needed to calculate break-even point can be found on a revenue and expenditure report known as the Statement of Activities Report. This report is usually prepared at the end of the month by the school nutrition office or the school business office. You will need the revenue, fixed costs, variable costs, and contribution margin for the period.

Fixed costs are those that do not vary with sales volume or number of customers served but stay fixed over time. The most common fixed costs are central office costs, manager's salary, basic telephone charges, core staff (not including substitute cost), and trash removal (unless by weight).

Variable costs are those that change with sales volume or number of customers served. The most common variable costs are food, supplies, paper goods, and some labor (temporary and part-time).

Contribution margin is the percent of revenue that can be used to cover fixed costs. For example, if the contribution margin is 46%, then 46 cents of every dollar in revenue goes to pay the fixed costs.

SHOW SLIDE: Break-Even Point Calculations

SAY: Use the following formulas to calculate break-even point:*

$$\begin{aligned} \text{BEP} &= \frac{\text{Fixed Costs}}{\text{Contribution Margin}} = \frac{\text{Fixed Costs}}{1 - (\text{Variable Cost} / \text{Revenue})} \\ &= \frac{\text{Fixed Costs}}{1 - \text{Variable Cost \%}} \end{aligned}$$

Note: When you have an operation within parentheses, do that calculation first. Then complete the remaining calculation.

*Charter and non-public schools that participate in the National School Lunch Program (NSLP) may use vended foodservice management companies, and this would not be calculated the same way. Please consult with your State agency child nutrition authorities for guidance.

ASK: Does anyone have any questions before we complete an activity? The activity may help to answer some of your questions.

DO: Wait for participants to respond.

SHOW SLIDE: Activity: Calculating Break-Even Point

ACTIVITY: Calculating Break-Even Point

Materials: Calculating Break-Even Point worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Break-Even Point** worksheet. Use the information and the instructions and table to calculate BEP using the formulas previously discussed. Answer the three questions.

SAY: Take out the **Calculating Break-Even Point** worksheet. Let's do this activity together.

DO: Read the instructions. Explain how to calculate BEP if someone does not understand.

Calculating Break-Even Point

Instructions: Using the information in the following table, calculate BEP using the formulas previously discussed.

Item	Revenues	Fixed Costs	Variable Costs
Revenue for the Period	\$130,450		
Food Cost			\$52,000
Labor Cost (Core Staff)		\$40,000	
Benefit Cost		\$15,000	
General Supplies/Paper Supplies Cost			\$22,000
Totals	\$130,450	\$55,000	\$74,000

$$\frac{\text{Fixed Costs}}{1 - (\text{Variable Costs} / \text{Revenue})} = \frac{\$55,000}{1 - (\$74,000 / \$130,450)} = \frac{\$55,000}{0.43} = \mathbf{\$127,906.98}$$

ASK: What is the break-even point? \$127,906.98

What is the contribution margin? 0.43

What does the contribution margin mean? It means that 43 cents of every dollar in revenue goes toward paying the fixed costs.

SAY: The break-even point can be used to determine if starting an initiative (i.e., a supper program, an afterschool snack program, etc.) will be financially feasible. Trends in BEP over time can indicate directions for improvement for making better financial decisions. The BEP can be calculated annually to create annual benchmark goals.

School nutrition programs are expected to be self-sustaining. Therefore, school nutrition programs are expected to, at a minimum, break-even.

An important concept to keep in mind is the impact of increasing participation or the number of meals served on fixed and variable costs. Increasing volume if fixed costs are high will lower the BEP. Increasing volume if variable costs are high will raise the BEP. For example, if food costs are too high and participation increases, the financial position of the SNP will worsen. However, if labor costs are too high and participation increases, the financial position of the SNP should improve.

The **Factors That Influence Break-Even Point** handout is a list of some of the revenues and expenditures that can affect your break-even point.

Factors That Influence Break-Even Point

Changes in Revenue:

- Federal sources
- State sources
- Local sources
- Student meal sales
- Adult meal sales
- Contract meal sales
- Nonprogram food sales
- Miscellaneous other revenue
- Interest
- Fund transfer-in
- Uncollected revenue

Changes in Expenditures:

- Food production supplies
- Salaries and wages
- Employee benefits
- Purchased food products
- USDA Foods used
- General operating supplies
- Purchased services
- Property operation
- Miscellaneous other expenditures
- Capital assets
- Indirect costs
- Fund transfer-out

ASK: Do you have any questions about break-even point, its importance, and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

Instructor's Note: Take a quick stretch break and divide the participants into different groups. Have them count off. Have the ones sit at a table, the twos at another, etc.

INVENTORY TURNOVER RATE

Objective: Calculate and analyze the efficient monthly and annual use of inventory to control food and supply costs.

SHOW SLIDE: *Inventory Turnover Rate*

SAY: In this section, we will cover inventory turnover and how to apply the information to determine if a school is holding too much inventory. The financial goal is to control food and supply costs for the school nutrition program.

ASK: Can someone tell me what inventory turnover is?

DO: Wait for participants to respond.

SAY: Inventory turnover is a measure of inventory efficiency. Specifically, it is the number of times inventory is utilized in a period.

ASK: Why would you want to calculate inventory turnover in your school?

DO: Wait for participants to respond.

SAY: Calculating inventory turnover each month allows the manager and director a means to control food and supply investments. Inventory turnover rate provides an indication of a SNP's ability to control inventory levels.

ASK: How often should you calculate inventory turnover rate?

DO: Wait for participants to respond.

FEEDBACK:

Inventory turnover rate can be calculated monthly and annually.

SHOW SLIDE: *Inventory Turnover Rate Calculations*

SAY: Let's look at how to calculate monthly inventory turnover. The beginning purchased inventory is the same figure as the previous month's ending purchased inventory. The following formula is used to determine inventory turnover rate:

$$\frac{\text{Cost of Goods Sold}}{\text{Average Inventory Value}} = \frac{(\text{Beginning Inventory} + \text{Purchases During Period}) - \text{Ending Inventory}}{(\text{Beginning Inventory} + \text{Ending Inventory})/2}$$

Let's look at an example.

Beginning inventory	\$6,600
Purchases during the month	\$11,400
Ending inventory	\$5,400
Cost of food used during the month	\$12,600

$$\frac{\text{Cost of Goods Sold}}{\text{Average Inventory Value}} = \frac{(\$6,600 + \$11,400) - \$5,400}{(\$6,600 + \$5,400)/2} = \frac{\$12,600}{\$6,000} = 2.1$$

The ending inventory of \$5,400 is the beginning inventory amount for the next month.

ASK: Can anyone tell me what the 2.1 represents?

DO: Wait for participants to respond.

FEEDBACK:

The 2.1 represents the number of times the inventory turned over or was used and replenished in a period of time. A school that receives a weekly delivery for most products should have a turnover rate of once every 7–10 days or 2–3 times a month.

SHOW SLIDE: ***Activity: Calculating Inventory Turnover Rate***

ACTIVITY: Calculating Inventory Turnover Rate

Materials: Calculating Inventory Turnover Rate worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Inventory Turnover Rate** worksheet. Calculate inventory turnover rate using the information in the chart.

SAY: Take out the **Calculating Inventory Turnover Rate** worksheet.

DO: Read the instructions. Walk around to help anyone that may have questions or need help. When everyone has completed the activity, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Inventory Turnover Rate

Instructions: Calculate inventory turnover rate using the information in the following chart. Then answer the question after you have completed the calculations.

Step # 1: Determine the beginning inventory for the month of February		\$ 8,496
Month	End of Month Inventory Value	Value of Food Purchases
January	\$8,496	\$24,021
February	\$7,144	\$18,677
March	\$9,297	\$21,583
Step # 2: Add the food purchases for the month of February		\$ 18,677
Equals food available in February		\$ 27,173
Step # 3: Less ending February inventory		\$ 7,144
Cost of Food Used in February		\$ 20,029

ASK: What is the beginning inventory for the month of March?

FEEDBACK:

- \$7,144

SAY: The information to calculate inventory turnover rate can be gathered from:

- Revenue and expenditure report (to show monthly purchases)
- Point-of-sale inventory system
- Inventory records from the beginning and end of a period

Inventory turnover benchmarks or standards should be established for each school in a district. When inventory turnover rate is low (or high inventory levels), it presents a number of problems. It is difficult to keep track of what products are on hand, more storage space is required, money is tied up, and it is harder to control waste or pilferage than when inventory turnover rate is high (or inventory levels are low).

A school that receives a weekly delivery for most products should have a turnover rate of once every 7–10 days or 2–3 times a month.

There are many factors that influence inventory turnover rate some of which include:

- Forecasting
- Inventory loss due to waste, theft, spoilage, and other product loss
- Secure and safe storage practices reduce inventory loss and ensure shelf life is maximized
- Frequency of deliveries
- Storage space
- Use a number of weeks of cycle menus
- Minimizing menu substitutions
- Large bids
- Order procedures (centrally placed orders allow for review and revision)
- Meals and meal counts
- Meal service interruptions where there is a loss of foodservice opportunity (i.e., snow days)
- Non-compliance with regulations

ASK: Does anyone have any questions about inventory turnover rate, its importance, and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

MEALS PER LABOR HOUR (MPLH)

Objective: Calculate meals per labor hour (MPLH) and apply the information to measure the productivity and production efficiency of the school nutrition program.

SHOW SLIDE: Meals Per Labor Hour

SAY: This section is on Meals Per Labor Hour (MPLH). We will cover calculating MPLH and how to apply the information in order to measure the productivity and production efficiency of the SNP.

ASK: Can someone tell me what MPLH is?

DO: Wait for participants to respond.

FEEDBACK:

MPLH is the measure of productivity and production efficiency for SNPs.

ASK: Why would you want to calculate MPLH in your school?

DO: Wait for participants to respond.

FEEDBACK:

MPLH can help determine how many employees or how many scheduled hours per employee are needed daily. The MPLH index is compared with labor because labor is dependent on the type of production. Examples of production systems used in the school nutrition program include conventional, cook-chill, and assembly-serve. Another type of production system used in the school nutrition program is distribution/service systems which includes satellite, on-site, and a combination of the two.

ASK: How often would you calculate MPLH?

DO: Wait for participants to respond.

FEEDBACK:

MPLH can be calculated weekly, monthly, or annually.

SHOW SLIDE: Steps to Calculate MPLH

SAY: The MPLH index is calculated on the actual productive, paid labor hours assigned to a site-level SNP.

MPLH can be determined for a school site by dividing the total meal equivalents for a given time period by the total number of productive paid labor hours for the same time period.

Planned productive labor hours include the amount of labor planned by a SNP, for managers/supervisors, kitchen staff, and cashiers. Paid hours for substitutes are included, but not paid hours for sick, personal, or holiday leave.

$$\text{MPLH} = \frac{\text{Number of Meals or Meal Equivalents}}{\text{Number of Planned Productive Labor Hours}}$$

Calculating MPLH can be completed in three steps.

- Step 1: Calculate total MEQ for the period
- Step 2: Calculate total hours of labor paid monthly, including all school nutrition employees and managers/supervisors
- Step 3: Divide the total MEQ by the total paid labor hours (excluding sick, personal, and holiday pay)

SHOW SLIDE: Activity: Calculating Meals Per Labor Hour (MPLH)

ACTIVITY: Calculating Meals Per Labor Hour (MPLH)

Materials: Calculating Meals Per Labor Hour worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Meals Per Labor Hour** worksheet. Calculate and fill in table to complete the meals per labor hour.

SAY: Let's complete an activity to see what you have learned. Look at the **Calculating Meals Per Labor Hour** worksheet. You are given a month of district information for a school nutrition program. Calculate the MPLH for the school nutrition program.

DO: Give participants about 5 minutes to complete the activity. Walk around to help anyone who may have questions or need help. At the end of the 5 minutes, go over the answers. Ask for volunteers to give their answers if time allows. Explain how to calculate MPLH if someone does not understand.

Calculating Meals Per Labor Hour (MPLH)

Instructions: Calculate and fill in the table below. When you have completed the calculation in the table, calculate MPLH using 8,465 MEQs.

Number of Staff Members That Work the Same Number of Hours Daily	×	Hours Worked Daily	=	Total Hours Worked Daily	×	Days in the Period	=	Total Staff Hours Planned for the Period
1	×	7	=	7	×	21	=	147
3	×	6	=	18	×	21	=	378
2	×	4	=	8	×	21	=	168
6		17		33		21		693

ASK: What is the MPLH and how did you arrive at that number?

FEEDBACK:

$8,465 \div 693 = 12.22$ or 12 MPLH

SAY: After MPLH is calculated, you can make a decision regarding staffing. If the evaluation indicates an excess of labor hours and increasing participation is not an alternative, adjustments in labor hours may be necessary. Refer participants to the **Staffing Guidelines for On-Site Production** handout. This handout can be used as a guide for staffing needs.

Staffing Guidelines for On-Site Production

Number of Meal Equivalents	Meals Per Labor Hour for Low and High Productivity			
	Conventional System MPLH		Convenience System MPLH	
	Low	High	Low	High
Up to 100	8	10	10	12
101–150	9	11	11	13
151–200	10–11	12	12	14
201–250	12	14	14	15
251–300	13	15	15	16
301–400	14	16	16	18
401–500	14	17	18	19
501–600	15	17	18	19
601–700	16	18	19	20
701–800	17	19	20	22
801 and up	18	20	21	23

Source: Pannell-Martin, D. & Boettger, J. (2014). *School food & nutrition service management for the 21st century* (6th ed.). Aiken, South Carolina: Author.

- A conventional system is the preparation of some foods from raw ingredients on premises (e.g., using some baked goods, prepared pizza, and washing the dishes).
- A convenience system is using maximum amount of processed foods (e.g., using all baked goods, precooked chicken, ready-to-serve raw fruits and vegetables, portion-packed condiments, and washing only trays and using disposable dinnerware).

SAY: Let's look at a method that can be used to determine the number of labor hours needed for the desired productivity level.

Decide the desired number of MPLH for the district for a month. This can also be calculated for each school site. Assume 14 MPLH is based on the type of meal service offered for the example calculation.

Divide the total MEQ by the desired number of MPLH to determine the total labor hours needed per month. Divide that number by the number of serving days in a month to determine the number of labor hours needed per day.

Example: $\frac{8,465 \text{ (Total MEQs)}}{14 \text{ (Desired MPLH)}} = 604.64$ or 605 (Total labor hours needed per month)

$605 \div 21 = 28.81$ or 29 hours per day

ASK: What would you need to do to achieve 14 desired MPLH?

DO: Wait for participants to respond.

SAY: Currently, the total hours worked daily is 33 hours. To achieve a desired 14 MPLH you would need to cut the daily hours worked to 29 hours.

ASK: Does anyone have any questions before we continue?

DO: Wait for participants to respond.

SAY: The meal count data is captured electronically or manually at the point-of-sale system utilized by school nutrition programs. This data can be found in reports such as end-of-day sales reports, edit check worksheets, and/or deposit reports. Labor hours are captured in the school district time keeping system (time card data, timesheet logs, etc.) or payroll records that can be found at the school business office or the district human resources office.

Calculating MPLH can help determine how many employees or how many scheduled hours per employee are needed in a single production unit or throughout the district. The MPLH index most effectively compares labor utilization within a system. Labor is dependent on the type of production systems (i.e., conventional, cook-chill, and assembly-serve) and distribution/service systems (satellite, on-site, and combination) used in a school nutrition program. The MPLH can be used to compare productivity between different school sites.

Explaining the importance of MPLH, how it is calculated, the variables that affect it, and how additional hours can be earned, is very motivating for managers. It allows them to better manage their own operations and gives them a level of control and understanding they might not otherwise have. Effective managers are able to explain staffing to their employees in clear and understandable terms and can encourage the entire team to work towards a common goal of ensuring adequate meal participation to support adequate labor hours.

ASK: Do you have any questions about Meals Per Labor Hour, its importance, and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

STAFF TURNOVER RATE

Objective: Calculate staff turnover rate to determine how often positions must be filled.

SHOW SLIDE: Staff Turnover Rate

SAY: In our next section, we will discuss staff turnover rate, where to find the information, why it is important in the school nutrition program, and how it is calculated.

ASK: Can someone tell me what staff turnover rate is?

DO: Wait for participants to respond.

FEEDBACK:

Staff turnover rate is the rate at which staff members leave employment, either voluntary or involuntary, and are replaced by new employees.

ASK: Why would you want to calculate staff turnover in your school?

DO: Wait for participants to respond.

FEEDBACK:

The timing of recruiting efforts can affect a SNP's ability to hire and train new employees to be ready for work when needed. It is extremely important to calculate this in areas with low unemployment rates. Hiring and training new employees is a costly process, and high turnover rates are indicative of internal problems, such as poor work environment, lack of opportunities for professional development and advancement, and poor supervision.

ASK: How often should you calculate staff turnover rate?

DO: Wait for participants to respond.

FEEDBACK:

Staff turnover rate can be calculated monthly and annually.

SHOW SLIDE: Staff Turnover Rate Calculation

SAY: The information you need to calculate staff turnover rate will come from payroll records, school nutrition records, and the school district human resource department. Once you have gathered the information the calculation for staff turnover rate is as follows:

$$\text{Staff Turnover Rate} = \frac{\text{The number of employees terminated during a period}}{\text{The number of employees at the end of the month}} \times 100$$

For example:

A SNP had two employees terminated during a month (voluntary or otherwise). At the end of the month, the SNP has a total of 22 full-time and part-time employees. Therefore, the staff turnover rate for the SNP is as follows:

$$\frac{2}{22} \times 100 = \mathbf{9.09 \text{ or } 9.1\%}$$

ASK: Does anyone have any questions?

DO: Wait for participants to respond.

SHOW SLIDE: Activity: Calculating Staff Turnover Rate**ACTIVITY: Calculating Staff Turnover Rate**

Materials: Calculating Staff Turnover Rate worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Staff Turnover Rate** worksheet. Calculate staff turnover rate using the information in the chart.

SAY: Let's do an activity to see how much you have learned. Take out the **Calculating Staff Turnover Rate** worksheet.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. When everyone has completed the activity, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Staff Turnover Rate

Instructions: Calculate staff turnover rate using the information in the following chart. Then answer the question after you have completed the calculations.

Staff Turnover Rate for September							
School	Number of Employees Terminated During September	÷	Number of Employees	×	100	=	Staff Turnover Rate
Elementary	2	÷	7	×	100	=	28.6%
Middle	1	÷	6	×	100	=	16.7%
High	0	÷	8	×	100	=	0.0%
District Totals	3	÷	21	×	100	=	14.3%

ASK: If the school nutrition director wanted to maintain a staff turnover rate of 10%, what if anything can be concluded from the rates in this activity?

SAY: The turnover rate for the month at the elementary and middle school is high, and the district totals are high. The director will need to determine why the employees left shortly after the beginning of the school year. There are several factors to consider. For example, problems with other employees, family problems, need to relocate, poor working conditions, poor supervision, etc. This is something the school nutrition director will need to investigate.

SAY: Staff turnover rate allows a school nutrition director to determine how often positions must be filled, and at what times of the year. This allows directors to plan recruiting and new staff training activities in advance. Annual calculation of this KPI can help in determining supervisory management issues and potential areas for supervisory staff development. High turnover rates can be indicative of internal problems, for example, poor work environment, lack of opportunities for professional development and advancement, poor supervision, etc. An investigation of these areas should be initiated to determine and address the specific issues. It is difficult for management to keep trained employees when the staff turnover rate exceeds 10%.

Factors that influence staff turnover rate include geographic location, population, labor pool, and state of the economy.

Employees often seek new employment for the following reasons:

- Poor hiring practices
- Lack of professional development opportunities
- Better opportunities elsewhere
- Poor treatment
- Inadequate pay
- Poor job satisfaction
- Poor morale
- Illness/family illness
- Relocation
- Retirement

Employee retention can be increased by:

- Careful hiring practices
- Providing routine training for all non-managerial employees
- Providing continuous training for managers to improve their supervisory skills
- Providing development opportunities for all salaried employees
- Seeking to understand and improve employee satisfaction through staff surveys, performance appraisals, and exit interviews

ASK: Does anyone have any questions about staff turnover rate and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

ABSENTEEISM RATE

Objective: Calculate and analyze the time employees miss work in order to control labor cost.

SHOW SLIDE: Absenteeism Rate

SAY: In the last section, we will cover absenteeism rate, where to find the information for calculating and analyzing, why it is important in the school nutrition program, and how it is calculated.

ASK: Can someone tell me what absenteeism rate is?

DO: Wait for participants to respond.

SAY: Absenteeism rate is the rate at which employees miss work due to personal illness, personal business, or other reasons (excluding paid vacation). These absences may be avoidable or unavoidable. This rate includes paid and unpaid leave. Absenteeism rate is the percentage of hours missed versus hours scheduled over a specific period of time.

ASK: Why would you want to calculate staff turnover in your school?

DO: Wait for participants to respond.

SAY: High absenteeism rates can increase labor costs and drain an organization's bottom line. As absenteeism rates increase, the following cost increases affect the school nutrition program:

- Increased labor costs associated with sick leave pay
- Pay of replacement employees
- Overtime pay
- A reduction in production quality and productivity

ASK: How often should you calculate absenteeism rate?

DO: Wait for participants to respond.

SAY: Absenteeism rate can be calculated monthly and annually.

SHOW SLIDE: Absenteeism Rate Calculation

SAY: The information to calculate absenteeism rate can be found on the staff schedules, time sheets, attendance records, payroll reports, or other human resource documentation that is available.

The formula for absenteeism rate is as follows:

Absenteeism Rate =

$$\frac{\text{Number of Lost Hours in a Month (absences other than paid vacation)}}{\text{Total Hours Planned for the Month (hours that would have been worked if there were no absences other than vacations)}} \times 100$$

An example:

In the month of October, a school district had the following:

- 83 lost hours due to absences other than paid vacation
- 2,772 total hours planned

The absenteeism rate for the month of October was calculated as follows:

$$\frac{83}{2,772} \times 100 = \mathbf{2.99 \text{ or } 3\%}$$

ASK: Does anyone have any questions?

DO: Wait for participants to respond.

SHOW SLIDE: Activity: Calculating Absenteeism Rate

ACTIVITY: Calculating Absenteeism Rate

Materials: Calculating Absenteeism Rate worksheet

Time: 5 minutes

Instructions: Refer participants to the **Calculating Absenteeism Rate** worksheet. Calculate absenteeism rate using the information in the chart.

SAY: Let's do an activity to see how much you have learned. Take out the **Calculating Absenteeism Rate** worksheet.

DO: Read the instructions. Give participants about 5 minutes to complete the activity. Walk around to help anyone that may have questions or need help. When everyone has completed the activity, go over the answers. Explain how to calculate the answers if someone does not understand.

Calculating Absenteeism Rate

Instructions: Calculate absenteeism rate using the information in the following chart. Then answer the question after you have completed the calculations.

Absenteeism Turnover Rate for September							
School	Number of Lost Hours Due to Absences Other Than Paid Vacation	÷	Total Planned Hours	×	100	=	Absenteeism Rate
Elementary	20	÷	693	×	100	=	2.9%
Middle	15	÷	798	×	100	=	1.9%
High	30	÷	693	×	100	=	4.3%
District Totals	65	÷	2184	×	100	=	3.0%

ASK: If the school nutrition director wanted to maintain a $\leq 2.9\%$ rate at each school, what would be your conclusion about this school district?

FEEDBACK:

The elementary school manager needs to watch the number of hours her staff misses. They are at the top of the district rate. The middle school is fine. The high school absenteeism rate is much higher than the district rate. The manager needs to pay close attention to the number of hours her staff misses, or the director may need to investigate the happenings at the high school. Each month will be different. If a school has an employee that calls in all the time and there is a pattern, the manager may need to talk with that employee.

SAY: The data may be broken down by week, month, quarter, year, school/site, or district. Data from this calculation can be observed over time to determine trends, and to improve management decisions that affect absenteeism.

There is not an industry standard for absenteeism rate. However, the United States absenteeism rate for full-time wage and salary workers for 2017 (Bureau of Labor Statistics, 2018) was $\leq 2.9\%$.

There are several factors that can influence absenteeism rate. The following are a few of these factors:

- Employee/family illness
- District employee benefit plan
- Absenteeism policy and procedures
- Staff morale/satisfaction
- Quality of available workforce/recruiter hiring practices
- Site manager skill/management style

ASK: Does anyone have any questions about absenteeism rate and how to calculate it?

DO: Answer questions to the best of your ability. If there are questions you cannot answer, tell the participants you will find out the answer and get back with them.

WRAP UP

SHOW SLIDE: *KPI Interactive Spreadsheets*

DO: If Internet is available, introduce the KPI Interactive Spreadsheets. Pull up the link <https://www.theicn.org/icn-resources-a-z/essential-kpis> and click on the *Essential KPIs Interactive Spreadsheet*. Spend about 5 minutes highlighting the spreadsheets.

SAY: Now that you have an understanding of the KPIs, ICN has developed some interactive spreadsheets that will help with the calculations. To use the spreadsheets, you will need to save the spreadsheet workbook to your hard drive. You might want to save a spreadsheet workbook for each school to determine how each school is performing.

The Excel workbook begins with a Table of Contents with a link to each spreadsheet. This will allow you to go to whichever spreadsheet you want without going through each one. Each spreadsheet has information about the spreadsheet and instructions on how to complete.

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.

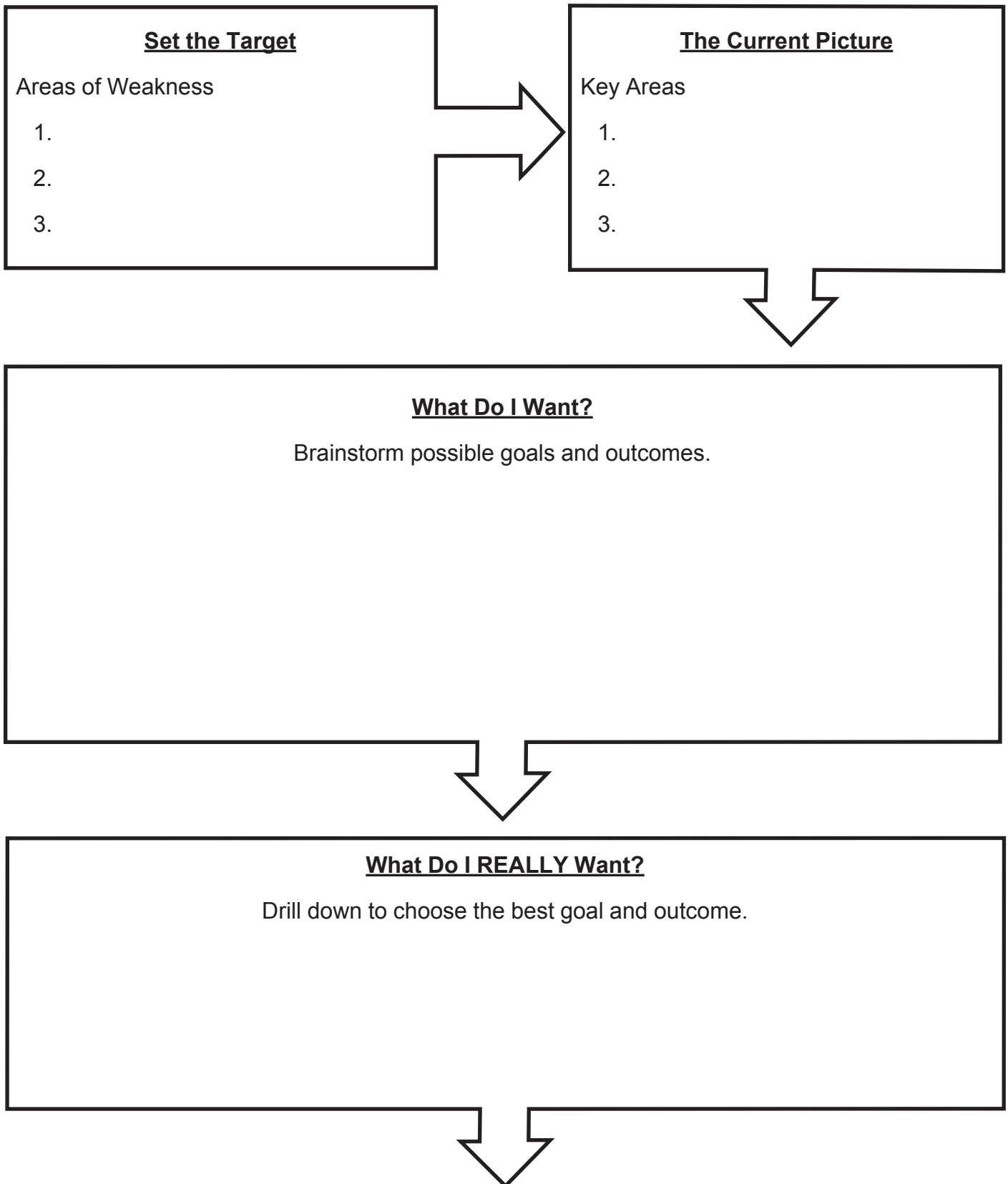
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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 Essential KPIs for School Nutrition Success. 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 Essential KPIs for SN Success** worksheet.

SMART Goals for Essential KPIs for SN Success



SMART Goals for Essential KPIs for SN Success, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

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

2022

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.

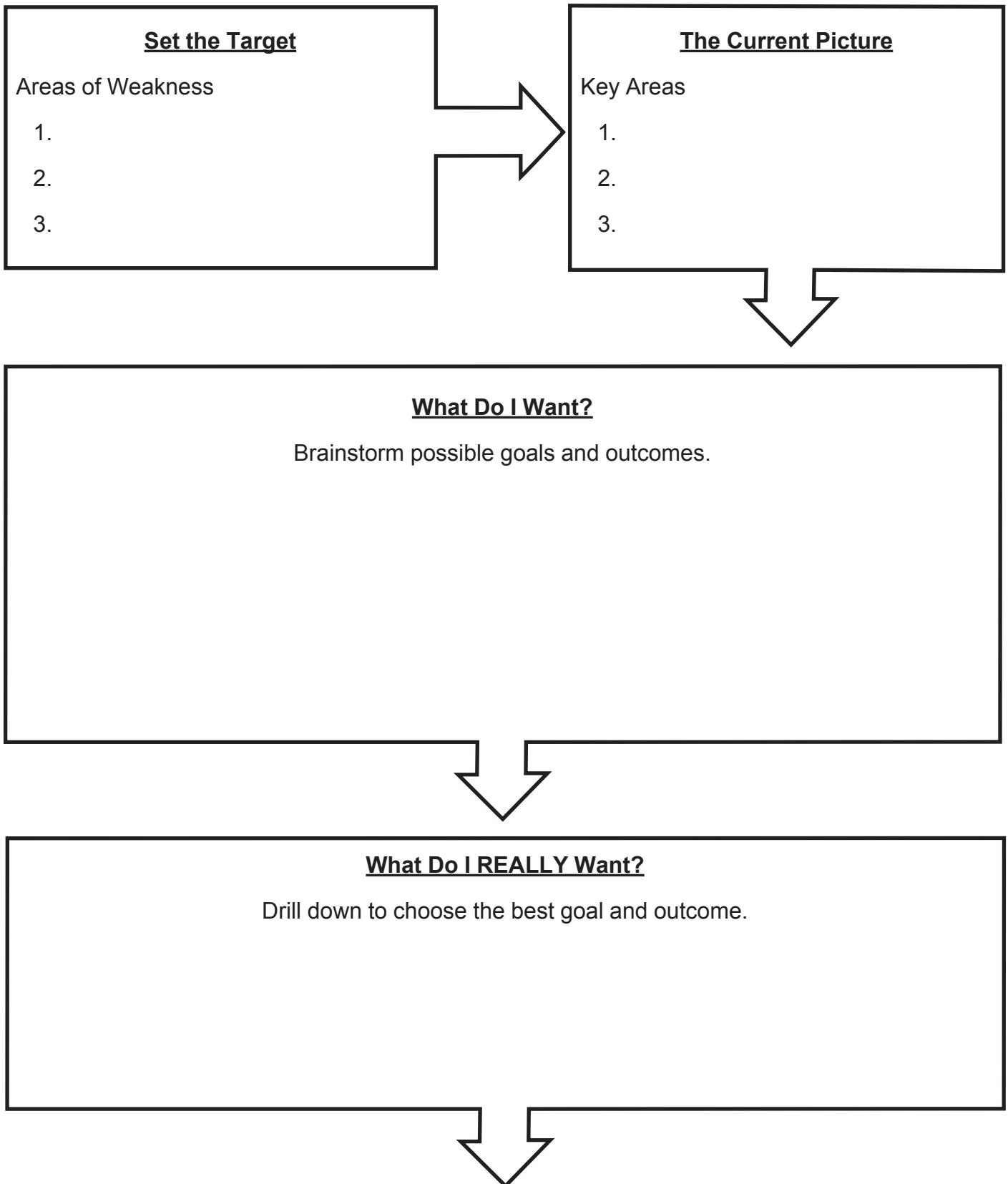
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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



SMART Goals for Human Resource Management, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p>	

Food Safety for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 ½ hours



Key Area: 3 (Administration)

USDA Professional Standards Code: 3400

2022

01/24/2022

Role of the School Nutrition Director

Creating a culture of food safety in a school nutrition program is integral to keeping food that is served to children in schools safe. It is the responsibility of the school nutrition director to support and promote the use of food safety best practices throughout the program.

A school's food safety plan is the framework for preventing a foodborne illness outbreak in the school. The creation and maintenance of the plan falls under the director's job duties. This includes monitoring and verifying that the plan works, whether it is being followed by employees, and that it is updated as needed. The director must ensure that all staff are trained, and retrained on the Standard Operating Procedures (SOPs) of a food safety plan. Implementation, verification, and documentation of food safety best practices provides confirmation that measures are taken to provide safe food. Everything from personal hygiene, time and temperature control, and cleaning and sanitizing must be included in the plan.

Lesson Objectives

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

- Describe good personal hygiene practices that reduce the risk of foodborne illness outbreaks.
- Describe best practices for keeping food safe throughout the foodservice process.
- Describe appropriate methods for cleaning and sanitizing.
- Describe the components of an effective food safety program.

Instructor's Note:

1. *Download the videos in this lesson to your laptop or a flash drive in case you do not have proper Internet connection at the site.*
2. *If the videos do not open, there will be a link on the PowerPoint slide.*
3. *Give out Employee Health and Personal Hygiene for Schools resource folder and Food Safety Spotlight – Food Safety Basics resource before class begins.*

Lesson-at-a-Glance

Time Allowed	Topic	Activity	Materials
Objective: Describe good personal hygiene practices that reduce the risk of foodborne illness outbreaks.			
45 minutes	<ul style="list-style-type: none"> • Lesson objectives • Food Safety Is Top Priority • Foodborne Illness and the "Big 6" • Personal Hygiene • Proper Handwashing • Proper Glove Use • Reporting, Handling, and Preventing, and Illness 	<ul style="list-style-type: none"> • Review Objectives • Steps for Effective Handwashing • Employee Health and Personal Hygiene video series 	<ul style="list-style-type: none"> • Participant's Workbook • <i>Employee Health and Personal Hygiene for Schools</i> resource folder • <i>Handwashing to Prevent the Spread of Disease</i> video • Computer, TV, or Projector • Speakers • <i>How to Properly Wash Your Hands</i> poster • <i>How to Properly Use Disposable Gloves</i> poster • <i>Employee Health and Personal Hygiene for Schools</i> resource folder • <i>Employee Health and Personal Hygiene for Schools</i> video series <ul style="list-style-type: none"> ▪ <i>Reporting Illness</i> ▪ <i>Handling Illness</i> ▪ <i>Preventing Illness</i>
Objective: Describe best practices for keeping food safe throughout the foodservice process.			
20 minutes	<ul style="list-style-type: none"> • Temperature Danger Zone • Calibrating Thermometers • Foodservice Process Steps 	<ul style="list-style-type: none"> • One-Minute Challenge • Calibrating a Thermometer: Ice Water Method 	<ul style="list-style-type: none"> • Participant's Workbook • <i>A Flash of Food Safety—Calibrating a Thermometer: Ice Water Method</i> video

Time Allowed	Topic	Activity	Materials
Objective: Describe appropriate methods for cleaning and sanitizing.			
5 minutes	<ul style="list-style-type: none"> • Cleaning and Sanitizing 		Participant's Workbook
Objective: Describe the components of an effective food safety program.			
20 minutes	<ul style="list-style-type: none"> • Food Safety Programs • HACCP Principles • The Process Approach to HACCP • Wrap Up • Conclusion – SMART Goals 	Menu Items by Process Category	Participant's Workbook
Total: 1 ½ hours			

Food Safety

SHOW SLIDE: Food Safety

SAY: Welcome to Food Safety, and Introduction to School Nutrition Leadership lesson for school nutrition directors. This course is an overview course designed by the Institute of Child Nutrition (ICN) to highlight important aspects of food safety and encourage further education on the topic. It was developed for new school nutrition directors and managers to provide a basic understanding of food safety enabling them to begin the job using safe food handling practices.

SHOW SLIDE: Lesson Objectives

DO: Review the objectives for this lesson.

SHOW SLIDE: Overview

SAY: This section of *Introduction to School Nutrition Leadership* is not an in-depth food safety training. We will talk briefly about personal hygiene, important food safety practices, proper cleaning and sanitizing, and developing a food safety program in your school. ICN encourages participants to seek more education on the topic of food safety. For more information and training on food safety please visit the ICN website theicn.org/foodsafety, to download all our materials free of charge. Several ICN food safety resources will be referenced during this session that will provide more information on the topics discussed as well as materials for training your staff.

SHOW SLIDE: Food Safety Is Top Priority

ASK: School nutrition programs (SNP) are required by law to have a food safety program. What are some other reasons why food safety is a top priority in school nutrition programs?

DO: Pause to allow for participant's responses and write them on a chart paper.

FEEDBACK:

- Make sure we are providing the safest food possible.
- To prevent foodborne illness outbreaks.
- Let us know what we are doing right and help us correct what we are doing wrong.
- Identify where we need to make changes to our procedures and training.

SAY: Ensuring the food served to children in schools is safe, is crucial to any school nutrition program. Whether it is an outbreak of a foodborne illness or a hazard in a food, every action made by school nutrition employees affects the safety of the meals that are prepared and served.

SHOW SLIDE: Foodborne Illness

SAY: Let's briefly review some terms related to foodborne illness and the causes. A foodborne illness is an illness that results from eating contaminated food and drinking contaminated liquids. Foodborne illness may be referred to as food poisoning or "stomach flu."

ASK: Have any of you ever had a foodborne illness? Do you know what caused it?

DO: Pause to allow participants to respond.

SAY: A foodborne illness outbreak is the occurrence of two or more cases of a similar illness resulting from ingestion of a common food.

ASK: Do you recall any foodservice establishment being responsible for an outbreak?

DO: Pause to allow participants to respond.

SHOW SLIDE: Causes of Foodborne Illness

SAY: There are three different types of contamination: biological, chemical, and physical. Biological contamination is the result of harmful microorganisms called pathogens infecting food and causing illness. There are over 40 different kinds of pathogens, including bacteria, viruses, parasites, and molds that may occur in food. Foodborne illness may also be caused by chemical contaminants. This includes chemicals, toxins, and metals. Physical contaminants such as metal shavings, bandages, dirt, or jewelry that get into food can injure anyone who eats the food.

SHOW SLIDE: The "Big 6" Foodborne Pathogens

SAY: Since the intent of this course is to provide a general overview of foodborne illness; detailed descriptions will not be covered. However, you can review the **Common Foodborne Illnesses** handout in the Participant's Workbook, for more detailed information. The chart highlights the "Big 6," as well as other common microorganisms that you should be aware of for your kitchen.

The U.S. Food and Drug Administration (FDA) has singled out the "Big 6" foodborne pathogens because they are highly contagious, can cause severe illness, and are easily transmitted through food. The "Big 6" foodborne pathogens are:

- Norovirus
- Hepatitis A virus
- *Shigella* spp.
- Shiga toxin-producing *Escherichia coli* (STEC)
- *Salmonella* Typhi (Typhoid fever)
- *Salmonella* (nontyphoidal)

More information on the "Big 6" foodborne pathogens is in the *Employee Health and Personal Hygiene for Schools* resource folder.

DO: Refer participants to the *Employee Health and Personal Hygiene for Schools* resource.

Common Foodborne Illnesses

Symptoms	Where Microorganism Can Be Found or Common Source	Prevention Strategies
Shiga toxin-producing <i>Escherichia coli</i> O157:H7 (<i>E. coli</i> infection)		
<p>Symptoms begin 3–8 days after eating contaminated food, can last 2–9 days, and include:</p> <ul style="list-style-type: none"> • Cramping • Diarrhea (watery or bloody) • Vomiting • Hemolytic uremic syndrome (HUS) 	<ul style="list-style-type: none"> • Intestinal tract of animals, particularly cattle and humans • Raw or undercooked ground beef • Raw milk or dairy products • Unpasteurized apple cider or juice • Imported cheeses • Dry salami • Uncooked fruits and vegetables 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Cook all poultry and meat to correct internal temperature, and confirm with a thermometer. • Use only pasteurized milk, dairy products, or juices. • Wash all produce in cold, running water. • Cool foods properly.
<i>Salmonella</i>, (nontyphoidal, Salmonellosis)		
<p>Symptoms begin 6–48 hours after eating contaminated food, last 1–2 days, and include:</p> <ul style="list-style-type: none"> • Stomach cramps • Headache • Nausea • Fever • Diarrhea • Vomiting • Severe dehydration (infants and elderly) 	<ul style="list-style-type: none"> • Raw meats and poultry • Milk and dairy products • Fish and shrimp • Sauces and salad dressings • Cake mixes • Cream-filled desserts and toppings • Peanut butter • Cocoa and chocolate • Sliced fresh fruits and vegetables such as melons, strawberries, or tomatoes • Raw sprouts 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Cook all foods to correct internal temperature and confirm with a thermometer. • Hold hot foods at 135 °F or above. • Cool foods properly.

Common Foodborne Illnesses

Symptoms	Where Microorganism Can Be Found or Common Source	Prevention Strategies
Typhoid Fever (caused by <i>Salmonella</i> Typhi)		
<p>Symptoms usually begin in 1–3 weeks, but may show as long as 2 months after exposure. Symptoms include:</p> <ul style="list-style-type: none"> • High fever • Stomach pain • Diarrhea or constipation • Aches • Headaches • Fatigue • Loss of appetite • Rash of flat, rose-colored spots 	<ul style="list-style-type: none"> • Intestinal tract of humans • Untreated or fecal-contaminated water or ice • Raw fish, meats, and poultry • Unpasteurized milk and dairy products • Raw vegetables, fresh fruit, and salads washed with untreated or sewage-contaminated water 	<ul style="list-style-type: none"> • Follow handwashing guidelines. • Avoid bare hand contact with ready-to-eat foods. • Report symptoms of diarrhea and vomiting and diagnosis of or exposure within the past 14 days to others with typhoid fever to your immediate supervisor. Do not work when you have these symptoms. • Use potable (clean) water for handwashing, cleaning, and sanitizing food contact surfaces and washing produce. • Ensure all foods are purchased from a safe supplier. • Cook all foods to correct internal temperature and confirm with a thermometer.
<i>Shigella</i> spp. (Shigellosis)		
<p>Symptoms begin 12–50 hours after eating contaminated food, last up to 2 weeks, and include:</p> <ul style="list-style-type: none"> • Abdominal pain • Diarrhea containing blood/mucus • Fever • Nausea • Vomiting • Chills • Fatigue • Dehydration 	<ul style="list-style-type: none"> • Intestinal tract of humans • Polluted water; spread by flies and food handlers • Meat salads • Potato and pasta salads • Lettuce and other raw vegetables • Milk and dairy products • Ready-to-eat foods 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Use water from approved sources. • Control flies. • Maintain storage temperatures. • Cool foods properly.

Common Foodborne Illnesses

Symptoms	Where Microorganism Can Be Found or Common Source	Prevention Strategies
Norovirus (Norwalk and Norwalk-Like Viral Agents)		
<p>Symptoms begin 1–2 days after ingesting contaminated food or water and include:</p> <ul style="list-style-type: none"> • Nausea • Vomiting • Diarrhea • Abdominal pain, • Headache • Mild fever 	<p>Norovirus (Norwalk and Norwalk-Like Viral Agents)</p> <ul style="list-style-type: none"> • Contaminated drinking water • Shellfish from contaminated water • Raw vegetables, fresh fruit, and salads contaminated by dirty hands 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow procedures to avoid cross-contamination. • Wash all fresh produce to be served whole, peeled, or cooked, in cold, running water. • Use water from approved sources. • Obtain shellfish from approved, health-inspected sources, and cook thoroughly. • Cook all foods to required internal temperatures, and confirm with a thermometer.
Hepatovirus (Hepatitis A)		
<p>Symptoms begin 10 days up to almost 2 months after ingesting contaminated food or water and include:</p> <ul style="list-style-type: none"> • Fever • Fatigue • Headache • Nausea • Loss of appetite • Vomiting • Stomach pain, and later jaundice (yellow skin and eyes) 	<p>Hepatovirus (Hepatitis A)</p> <ul style="list-style-type: none"> • Intestinal tract of humans • Human urinary tract • Contaminated water • Foods contaminated by food handlers, processing plants, or foodservice facilities • Foods of particular concern—prepared foods requiring no additional cooking: deli meats, salads, sandwiches, fruit and fruit juices, milk and dairy products, raw fruits and vegetables 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow procedures to avoid cross-contamination. • Wash all fresh produce to be served whole, peeled, or cooked, in cold, running water. • Use water from approved sources. • Cook all foods to the required internal temperature, and confirm with a thermometer.

Common Foodborne Illnesses

Symptoms	Where Microorganism Can Be Found or Common Source	Prevention Strategies
<i>Clostridium botulinum</i> (Botulism)		
<p>Symptoms begin 18–36 hours after eating contaminated food and include:</p> <ul style="list-style-type: none"> • Diarrhea or constipation • Weakness • Dizziness • Double vision or blurred vision • Difficulty speaking, swallowing, or breathing • Paralysis 	<ul style="list-style-type: none"> • Home-canned foods • Improperly processed foods • Sausages and meats • Canned low-acid foods, such as certain vegetables • Untreated garlic in oil • Leftover, unrefrigerated, foil-wrapped baked potatoes • Sautéed onions in butter sauce 	<ul style="list-style-type: none"> • Discard damaged cans. • Do not use home-canned foods in a foodservice establishment. • Do not mix and store oil and garlic. • Follow rules for time and temperature control. • Sauté onions as needed. Do not sauté and store unrefrigerated for later use. • Do not store leftover baked potatoes in foil wrapping. Unwrap and chill correctly. • Cool foods properly.
<i>Campylobacter jejuni</i> (Campylobacteriosis)		
<p>Symptoms begin 2–5 days after eating contaminated food, can last 7–10 days, and include:</p> <ul style="list-style-type: none"> • Diarrhea (watery or bloody) • Fever • Nausea and vomiting • Abdominal pain • Headache • Muscle pain 	<ul style="list-style-type: none"> • Unpasteurized milk and dairy products • Raw poultry • Raw beef • Non-chlorinated or fecal-contaminated water • Birds and flies can carry and contaminate food 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Cook all poultry, meat, and other foods to appropriate internal temperature and confirm with a thermometer. • Maintain good pest control. • Use only pasteurized dairy products. • Use water from approved sources.

Common Foodborne Illnesses

Symptoms	Where Microorganism Can Be Found or Common Source	Prevention Strategies
<i>Clostridium perfringens</i>		
<p>Symptoms begin 8–24 hours after eating contaminated food, last 24 hours, and include:</p> <ul style="list-style-type: none"> • Abdominal cramping • Diarrhea 	<ul style="list-style-type: none"> • Intestinal tracts of humans and animals • Cooked meat and poultry • Gravy • Beans 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Cook all foods to correct internal temperature and confirm with a thermometer. • Hold hot foods at 135 °F or above. • Cool foods properly.
<i>Listeria monocytogenes (Listeriosis)</i>		
<p>Symptoms begin 3–70 days after eating contaminated food; 21-day onset is most common. Symptoms include:</p> <ul style="list-style-type: none"> • Sudden onset of fever • Muscle aches • Diarrhea or vomiting • Headaches • Stiff neck • Confusion • Loss of balance • Convulsions 	<ul style="list-style-type: none"> • In soil, ground water, plants, and intestinal tracts of humans and animals • Unpasteurized milk and cheese • Ice cream • Raw vegetables • Raw and cooked poultry • Raw meat and fish • Prepared and chilled ready-to-eat foods • Deli meats, luncheon meats, hot dogs • Soft cheese such as feta, Brie, and Mexican-style cheeses 	<ul style="list-style-type: none"> • Practice good personal hygiene. • Follow handwashing guidelines. • Follow procedures to avoid cross-contamination. • Cook all poultry and meat to correct internal temperature and confirm with a thermometer. • Use only pasteurized milk, dairy products, or juices. • Wash all fresh produce in cold, running water. • Clean and sanitize food contact surfaces. • Maintain proper food temperatures.

PERSONAL HYGIENE

Objective: Describe good personal hygiene practices that reduce the risk of foodborne illness outbreaks.

SHOW SLIDE: *Personal Hygiene*

SAY: The FDA's *Employee Health and Personal Hygiene Handbook* discusses three ways to prevent the spread of foodborne illness:

- Restricting and excluding ill employees
- Properly washing hands
- Preventing bare hand contact with ready-to-eat foods

It is important for employees to follow all good personal hygiene and employee health procedures. The FDA identified personal hygiene as one of the areas where employees often do not comply with proper practices. By following practices like using good handwashing procedures, eliminating bare hand contact with ready-to-eat-foods, and reporting illness to your manager or director, you can prevent the spread of foodborne illness. Your school nutrition program should have a Standard Operating Procedure (SOP) that covers personal hygiene procedures that employees need to follow. The **Personal Hygiene Sample SOP** handout is in the workbook. We will now discuss these personal hygiene practices further.

Personal Hygiene (Sample SOP)

PURPOSE: To prevent contamination of food by school nutrition employees.

SCOPE: This procedure applies to school nutrition employees who handle, prepare, or serve food.

KEY WORDS: Personal Hygiene, Cross-Contamination, Contamination

INSTRUCTIONS:

1. Train school nutrition employees on using the procedures in this SOP.
2. Follow State or local health department requirements.
3. Follow your districts employee health policy.
4. Report to work in good health, clean, and dressed in clean attire. Report any illnesses to your manager.
5. Change apron when it becomes soiled.
6. Wash hands properly, frequently, and at the appropriate times.
7. Keep fingernails trimmed, filed, and maintained.
8. Do not wear artificial fingernails or fingernail polish.
9. Wear single-use gloves if artificial fingernails or fingernail polish are worn.
10. Do not wear any jewelry except for a plain ring such as a wedding band.
11. Treat and bandage wounds and sores immediately. When hands are bandaged, single-use gloves must be worn.
12. Cover a lesion containing pus with a bandage. If the lesion is on a hand or wrist, cover with an impermeable cover such as a finger cot or stall and a single-use glove. Show a supervisor any lesion before working.
13. Eat, drink, or chew gum only in designated break areas where food or food contact surfaces may not become contaminated.
14. Taste food the correct way:
 - Place a small amount of food into a separate container.
 - Step away from exposed food and food contact surfaces.
 - Use a teaspoon to taste the food. Remove the used teaspoon and container to the dish room. Never reuse a spoon that has already been used for tasting.
 - Wash hands immediately.
15. Wear suitable and effective hair restraints while in the kitchen.

MONITORING:

1. The kitchen supervisor will inspect employees when they report to work to be sure that each employee is following this SOP.
2. The kitchen supervisor will monitor that all school nutrition employees are adhering to the personal hygiene policy during all hours of operation.

CORRECTIVE ACTION:

1. Retrain any school nutrition employee found not following the procedures in this SOP.
2. Discard affected food.

VERIFICATION AND RECORD KEEPING:

The school nutrition manager will verify that school nutrition employees are following this SOP by visually observing the employees during all hours of operation. The school nutrition manager will complete the Food Safety Checklist daily. School nutrition employees will record any discarded food on the Damaged or Discarded Product Log. The Food Safety Checklist and Damaged or Discarded Product Logs are to be kept on file for a minimum of 1 year.

DATE IMPLEMENTED: _____ **BY:** _____

DATE REVIEWED: _____ **BY:** _____

DATE REVISED: _____ **BY:** _____

SHOW SLIDE: Handwashing to Prevent the Spread of Disease

SAY: Handwashing is one of the most important prevention practices for school nutrition employees to follow to prevent foodborne illnesses. Handwashing reduces contamination on hands and prevents it from passing to food. Organisms can get on hands from a number of sources—such as a dirty cutting board, a pencil, or a refrigerator handle—and then move from hands to food or equipment during preparation and service. An infected school nutrition employee, or one with unclean hands or exposed portions of arms or fingernails, can contaminate food, potentially causing illness. Food equipment contaminated by unclean hands can further spread illness through cross-contamination. Cross-contamination is the transfer of bacteria or viruses from hands to food, food to food, or equipment and food contact surfaces to food. We will now talk about how to properly wash hands and when hands should be washed. We will watch a short video on handwashing procedures.

SHOW SLIDE: Activity: Handwashing to Prevent the Spread of Disease Video

DO: Show *Handwashing to Prevent the Spread of Disease* video.

SHOW SLIDE: How to Properly Wash Your Hands**SHOW SLIDE: Activity: Steps for Effective Handwashing****ACTIVITY: Steps for Effective Handwashing**

Materials: none

Time: 5 minutes

Instructions: Lead the class in demonstrating washing your hands properly while singing either "Happy Birthday" or the "ABC Song." This shows how long one should wash hands as the songs are approximately 20 seconds in length.

SAY: The *Handwashing to Prevent the Spread of Disease* video provided a quick look at how to wash your hands. Now, let's practice washing our hands remembering the steps to proper handwashing while we sing a favorite, well known song. ("Happy Birthday" as it takes about 20 seconds to sing it, or the "ABC song" twice.)

DO: Demonstrate the steps for proper handwashing, explaining the steps as everyone sings.

1. Use the handwashing sink with running warm water.
2. Rinse hands and exposed parts of the arms under running water and apply soap.
3. Lather hands together for at least 10–15 seconds, paying close attention to fingernails, between the fingers/fingertips, and surfaces of the hands and arms.
4. Rinse thoroughly with clean, warm running water.
5. Thoroughly dry the hands and exposed portions of arms with single-use paper towels or a heated-air, hand-drying device.
6. Avoid recontamination of hands and arms by using a paper towel to turn off hand sink faucets and to open the restroom door.

SAY: Now that you know how to wash your hands, let's discuss when to wash your hands.

ASK: When are times during the day that you need to wash your hands?

FEEDBACK:

- Whenever hands are soiled
- Before beginning food preparation
- Before putting on disposable gloves
- Before serving customers
- After arriving at work
- After breaks
- After using the restroom (and again at the kitchen handwashing sink)
- After eating, drinking, or chewing gum
- After using the telephone
- After using a handkerchief or tissue
- After handling inventory
- After handling raw food
- After touching or scratching areas of the body, such as ears, mouth, nose, or hair
- After coughing or sneezing
- After clearing or cleaning tables
- After clearing, scraping, or washing dirty plates or utensils
- After handling garbage
- After handling money on the cafeteria line
- After touching dirty aprons, clothing, or surfaces
- After using chemicals

DO: Review any answers that were not given by the participants as listed in the Feedback section. Locate the **How to Properly Wash Your Hands** poster in the toolbox materials.

SAY: ICN has many resources to help you remember how to wash your hands properly. The **How to Properly Wash Your Hands** poster provides both written and visual reminders to practice effective handwashing. You can hang this poster next to the sinks throughout your facility to help employees remember the steps for proper handwashing. This poster is available to download for free at theicn.org/foodsafety on the ICN website.

DO: Pass the poster around so participants can look at it as you move on with the lesson.

SAY: You received a set of *Food Safety Spotlight* handouts earlier today. Find *Food Safety Spotlight: Personal Hygiene: Handwashing* handout. It is a sample of the *Food Safety Spotlight: Food Safety Basics*, which contains roughly 15-minute lessons, designed for directors and managers to use in training their staff. Every lesson plan contains the following:

- Learning objective
- Statement explaining the importance of the topic
- List of materials
- Instructions on how to present the information
- Questions to ask staff
- Additional resources to strengthen or refresh the knowledge of the director/manager

The entire resource is available on the ICN website.

Food Safety Spotlight

Personal Hygiene: Handwashing

Objective: Demonstrate proper handwashing, and state when to wash your hands.

Why it is important: Proper handwashing is one of the easiest and most efficient ways to prevent contamination of food by removing germs from hands.

Materials:

- *Handwashing to Prevent the Spread of Disease* video
- Computer, TV, or projector
- Speakers
- *How to Properly Wash Your Hands* poster (English and Spanish): theicn.org/foodsafety
- Poster paper
- Marker
- Painters tape

Instructions: Show video. Request a staff member demonstrate proper handwashing. Ask questions. Record the answers on poster paper for everyone to see. Discuss answers recorded. Answer all staff questions. Post a handwashing poster at every sink in the kitchen and restrooms.

Questions for the staff:

- **What are the steps for properly washing your hands?**
 1. Wet hands and forearms with warm running water and apply soap.
 2. Scrub lathered hands and forearms, under fingernails, and between fingers for at least 10–15 seconds.
 3. Rinse thoroughly under warm running water for 5–10 seconds.
 4. Dry hands and forearms thoroughly with single-use paper towels, or using a warm air hand dryer.
 5. Turn off water using paper towels.
 6. Use paper towel to open door when exiting the restroom.



- **When should you wash your hands?**

- Before
 - Beginning to work, either at the beginning of shift or after breaks
 - When moving from one food preparation area to another
 - Putting on or changing disposable gloves
- After
 - Using the toilet
 - Sneezing, coughing, or using a handkerchief or tissue
 - Touching hair, face, or body
 - Handling raw meats, poultry, or fish
 - Eating, drinking, or chewing gum
 - Clean up activity such as sweeping, mopping, or wiping counters
 - Touching dirty dishes, equipment, or utensils
 - Handling trash
 - Handling money
 - Any time that hands may have become contaminated

SHOW SLIDE: No Bare Hand Contact with Ready-to-Eat Foods

SAY: Bare hand contact with ready-to-eat foods (i.e., food that is eaten without further washing or cooking) can result in contamination of food and contribute to foodborne illness outbreaks. Therefore, school nutrition employees should always use suitable utensils such as spatulas, tongs, single-use gloves, or dispensing equipment when handling ready-to-eat foods.

SHOW SLIDE: Gloves

SAY: Many State food codes require that school nutrition employees wear disposable or single-use gloves when handling ready-to-eat foods, or those foods that will not receive any additional preparation such as cooking. Disposable gloves provide a second line of defense against cross-contamination, but only when they are used properly.

SAY: There are several guidelines for using gloves that should be followed by school nutrition employees. The *How to Properly Use Disposable Gloves* poster follow along with these guidelines.

- Use disposable gloves that fit well.
- Wash hands before and after use of disposable gloves.
- Wear gloves when preparing and serving ready-to-eat foods such as fresh fruits and vegetables, sandwiches, and salads.
- Change gloves frequently and between tasks.
- Never handle money and food while wearing the same gloves.
- Change gloves after sneezing, wiping nose, touching hair, or other contact with germs.
- Never reuse or wash gloves.
- Dispose of soiled or torn gloves after use.
- If gloves are used to handle raw animal food (meat, poultry, fish, eggs), the gloves can only be used for that task. They must be changed and hands must be washed before working with different raw meats or ready-to-eat food.

ASK: Why would it be important for disposable gloves to fit well?

FEEDBACK:

If large gloves are used, there is a possibility that the fingertips of the gloves could be cut off, creating a potential physical hazard.

ASK: Why is it important to wash hands before putting on gloves?

FEEDBACK:

It helps prevent cross-contamination.

ASK: Why is “changing gloves between tasks” a guideline?

FEEDBACK:

It helps prevent cross-contamination.

SAY: For more detailed information on bare hand contact with ready-to-eat foods and gloves, please refer to our *Employee Health and Personal Hygiene for School Nutrition Managers and Directors Guide*. To help train your staff in proper glove use and personal hygiene, please refer to *Food Safety Spotlight – Personal Hygiene: Proper Glove Use and Attire* handout.

Food Safety Spotlight

Personal Hygiene: Proper Glove Use and Attire

Objective: Describe how to properly use gloves and what kind of attire to wear to work.

Why it is important: Properly using gloves and wearing clean and proper attire can prevent food from being contaminated by an employee. Gloves can help prevent the contamination of ready-to-eat foods by placing a barrier between the employee's hands and the food. Proper attire such as a hairnet and wearing clean clothes can prevent the employee from accidentally transferring outside contaminants into the food.

Materials:

- *How to Properly Use Disposable Gloves* poster (English and Spanish): www.theicn.org/foodsafety
- *Personal Hygiene mini-poster* (English and Spanish): www.theicn.org/foodsafety
- Poster paper
- Marker
- Painters tape

Instructions: Discuss steps for proper glove use. Reinforce proper glove use by posting the *How to Properly Use Disposable Gloves* poster in the kitchen. Show the *Personal Hygiene* poster. Discuss the importance of dressing for success and safety in the kitchen. Ask questions. Record the answers on poster paper for everyone to see. Discuss answers recorded. Answer all staff questions. After the training, hang posters.

Questions for the staff:

- **When should you change your gloves?**
 - Frequently and between tasks
 - After sneezing, wiping nose, touching hair, or other contact with germs
 - If gloves are soiled
 - If gloves are torn
 - If handling raw animal food (meat, poultry, fish, eggs) then changing tasks to work with different raw meats or ready-to-eat foods



- **What should you do before putting on gloves and between changing gloves?**
 - Wash hands
- **What is proper work attire?**
 - Report to work in good health, clean, and dressed in clean attire.
 - Change apron when it becomes soiled.
 - Keep fingernails trimmed, filed, and maintained.
 - Keep fingernails short and without artificial nails or nail polish.
 - Do not wear any jewelry except for a plain ring such as a wedding band.
 - Treat and bandage wounds and sores immediately. When hands are bandaged, single-use gloves must be worn.
 - Report any illness to your manager.
 - Cover any lesion containing pus with a bandage. If the lesion is on a hand or wrist, cover with an impermeable cover such as a finger cot or stall and a single-use glove.
 - Eat, drink, or chew gum only in designated break areas where food or food contact surfaces may not become contaminated.
 - Wear hairnet, hat, or cap while in the kitchen.
- **How should a hairnet be worn?**
 - Wear a hairnet, hat, or cap while in the kitchen. The hairnet should cover the hairline around the face and back of the neck without any hair sticking out.

SHOW SLIDE: Report Symptoms

SAY: While we are talking about practices to prevent foodborne illnesses, we need to talk about when employees should report symptoms to their supervisor. The *Food Code* states that employees should report any of the following symptoms:

- Vomiting
- Diarrhea
- Jaundice
- Sore throat with fever
- Lesions containing pus, such as a boil or infected wound that is open and draining
- Diagnosis in the past three months by a health practitioner with one of the "Big 6" foodborne pathogens
- Exposure to any of these illnesses

SHOW SLIDE: Employee Health and Personal Hygiene Video Series**ACTIVITY: Employee Health and Personal Hygiene Video Series****Materials:**

- *Employee Health and Personal Hygiene for School video series*
 - *Reporting Illness*
 - *Handling Illness*
 - *Preventing Illness*
- Computer, TV, or Projector
- Speakers
- **Employee Health and Personal Hygiene Video Key Points** worksheet

Time: 15 minutes

Instructions: The trainer will show all three parts of the video mini-series, stopping in between each part to ask discussion questions. The questions and their possible answers are listed here. Key points from the video mini-series are in the **Employee Health and Personal Hygiene Video Key Points** worksheet in the Participant's Workbook. Participants do not need to write anything down and should be encouraged to focus on the videos. These key points are in the Instructor's Manual in the form of discussion questions and answers for each video.

Instructor's Note: *The videos for this lesson are on the ICN website, and there is a quick link to these on the PowerPoint slides. It is best to download these videos to your laptop or a flash drive prior to training in case you do not have internet access at the site.*

SAY: We will now view the *Employee Health and Personal Hygiene* video series. You do not have to write anything down and should focus on the video.

DO: Show *Employee Health and Personal Hygiene* video series.

Employee Health and Personal Hygiene Video Key Points

1. What symptoms should you report to your supervisor?

- Diarrhea
- Vomiting
- Sore throat with fever
- Infected wound or boil on hands or arms
- Jaundice (yellowing of skin and eyes)
- Diagnosis of or exposure to a foodborne illness

2. What are the “Big 6” foodborne pathogens?

- Norovirus
- *Salmonella*
- *Salmonella* Typhi
- *E. coli*
- *Shigella*
- Hepatitis A

3. What is the difference between being excluded and restricted from work?

- Exclusion means a school nutrition employee is not permitted to work in or enter a food preparation site. This requirement applies to areas where food is received, prepared, stored, packaged, served, vended, transported, or purchased.
- Restriction means a school nutrition employee's activities are limited to prevent the risk of transmitting a disease through food. A restricted employee cannot handle exposed food; clean equipment, utensils, linens; or unwrapped single-service or single-use articles.

4. What symptoms require exclusion from work?

- Vomiting
- Diarrhea
- Jaundice (yellowing of the skin and eyes)
- Diagnosed with one of the “Big 6” foodborne pathogens
- Sore throat with fever if working with a highly susceptible population (e.g., preschool age children, immunocompromised people, or older adults)

5. What symptoms require restriction at work?

- Sore throat with fever if not working with a highly susceptible population (e.g., preschool age children, immunocompromised people, or older adults)
- Open wounds or cuts on the hands or arms that are not properly covered

6. What are some jobs that can be performed under restriction?

- Cashier
- Stocking canned or packaged food products
- Cleaning and maintenance outside of production kitchen

7. What are the employee's incorrect actions that contributed to the foodborne illness outbreak?

- She did not report her symptoms of illness to her supervisor.
- She wore her apron in the restroom.
- She did not wash her hands properly after throwing up in the restroom.
- She wiped her hands on her apron.
- She double gloved her hands.
- She sneezed into her gloves and did not throw her gloves away, wash her hands, or put on a new pair of gloves.
- She sneezed over the food.
- She wiped her face with a towel and then used that towel to clean a scoop.

8. What are some ways to prevent a foodborne illness?

- Report symptoms to your supervisor.
- Exclude or restrict employees based on symptoms.
- Wash hands properly and at proper times.
- No bare hand contact with ready-to-eat foods.
- Replace gloves when they become dirty or when switching tasks.
- Protect an infected cut or wound with a bandage and a single use glove.

SHOW SLIDE: Video: Reporting Illness

DO: Show the first video of the series *School Employee Health and Personal Hygiene Video Mini-Series Part 1: Reporting Illness*. After showing the video, ask participants the following discussion questions.

Discussion Questions for Part 1: Reporting Illness

ASK: What did Chris do correctly?

FEEDBACK:

- She reported her symptoms to her supervisor.
- She did not come to work.

ASK: What symptoms should you report to your supervisor?

FEEDBACK:

- Diarrhea
- Vomiting
- Sore throat with fever
- Infected wound or boil on hands or arms
- Jaundice (yellowing of the skin and eyes)
- Diagnosis of a foodborne illness

ASK: Do you remember what the "Big 6" foodborne pathogens are?

FEEDBACK:

- Norovirus
- *Salmonella*
- *Salmonella* Typhi
- *E. coli*
- *Shigella*
- Hepatitis A

SAY: Good! Now, we will watch the second part of the video series. Once again, please pay attention to the video.

SHOW SLIDE: *Video: Handling Illness*

DO: Show the second video of the series, *School Employee Health and Personal Hygiene Video Mini-Series Part 2: Handling Illness*. After showing the video, ask participants the following discussion questions.

Discussion Questions for *Part 2: Handling Illness*

ASK: What is the difference between being excluded and restricted from work?

FEEDBACK:

- Exclusion means a school nutrition employee is not permitted to work in or enter a food preparation site. This requirement applies to areas where food is received, prepared, stored, packaged, served, vended, transported, or purchased.
- Restriction means a school nutrition employee's activities are limited to prevent the risk of transmitting a disease through food. A restricted employee cannot handle exposed food; clean equipment, utensils, or linens; or unwrapped single-service or single-use articles.

ASK: What symptoms require exclusion from work?

FEEDBACK:

- Vomiting
- Diarrhea
- Jaundice
- Diagnosis with one of the "Big 6" foodborne pathogens
- Sore throat with fever if working with a highly susceptible population (i.e., preschool age children, immunocompromised people, or older adults)

ASK: What symptoms require restriction at work?

FEEDBACK:

- Sore throat with fever if not working with a highly susceptible population (i.e., preschool age children, immunocompromised people, or older adults)
- Open wounds or cuts on the hands or arms that are not properly covered

ASK: What are some jobs that can be performed under restriction?

FEEDBACK:

- Cashier
- Stocking canned or packaged food products
- Cleaning and maintenance outside of production kitchen

SAY: Good! Now, we will watch the final part of the video series.

SHOW SLIDE: *Video: Preventing Illness*

DO: Show the third video of the series, *School Employee Health and Personal Hygiene Video Mini-Series Part 3: Preventing Illness*. After showing the video, ask participants the following discussion questions.

Discussion Questions for *Part 3: Preventing Illness*

ASK: What are the employee's incorrect actions that contributed to the foodborne illness outbreak?

FEEDBACK:

- She did not report her symptoms of illness to her supervisor.
- She wore her apron in the restroom.
- She did not wash her hands properly after throwing up in the restroom.
- She wiped her hands on her apron.
- She double gloved her hands.
- She sneezed into her gloves, did not throw her gloves away, wash her hands, or put on a new pair of gloves.
- She sneezed over the food.
- She wiped her face with a towel and then used that towel to clean a scoop.

ASK: What are some ways to prevent a foodborne illness?

FEEDBACK:

- Report symptoms to your supervisor.
- Exclude or restrict employees based on symptoms.
- Wash hands properly and at proper times.
- No bare hand contact with ready-to-eat foods.
- Replace gloves when they become dirty or when switching tasks.
- Protect an infected cut or wound with a bandage and a single use glove.

SAY: For more detailed information on handling foodborne illness and responsibilities with reporting illnesses, please refer to our *Employee Health and Personal Hygiene for School Nutrition Managers and Directors Guide*. This resource contains the *Sample School Nutrition Employee Health and Personal Hygiene Agreement* that may be helpful in hiring staff.

IMPORTANT FOOD SAFETY PRACTICES

Objective: Describe best practices for keeping food safe throughout the foodservice process.

SHOW SLIDE: *Temperature Danger Zone*

SAY: One of the most important ways that we keep food safe is by controlling time and temperature. The temperature danger zone, which is 41 °F to 135 °F, is the temperature range where bacteria grow rapidly. Bacteria can double in number in as little as 20 minutes. At this rate, harmful bacteria that cause foodborne illness can quickly grow in food.

Instructor's Note: *Different jurisdictions may have different requirements for the temperature danger zone. The Food Code uses the 41 °F–135 °F guideline. If asked, the USDA's Food Safety Inspection Service uses the 40 °F–140 °F temperature danger zone for consumer guidelines. Different states have adopted different versions of the Food Code and may have a different temperature danger zone.*

SAY: Our goal in school nutrition is to keep food out of the temperature danger zone as much as possible, and when it is not possible, to limit the time that foods are in that temperature range. There are foods that need to be treated with extra care in regards to time and temperature exposure. These foods are called time and temperature control for safety foods (TCS) foods and require these controls to limit growth of harmful microorganisms or toxic formations.

SHOW SLIDE: Time and Temperature Control for Safety (TCS) Foods

SAY: Foods that require control of time and temperature to limit pathogenic microorganism growth or toxin formation are TCS foods. Examples include cooked meat, cut melons, cut leafy greens, cut tomatoes, and cooked rice. You may ask why time and temperature are so critical to keeping food safe. Nutrients, water, and the acidity of these foods support bacterial growth. By limiting the time bacteria have to use these resources, you prevent bacterial growth. Cooking foods to their appropriate internal temperatures reduce bacteria numbers. By holding hot food at or above 135 °F, it stays hot enough to prevent bacteria from growing. Likewise, by holding cold food at or below 41 °F, it stays out of the temperature range needed for bacteria growth.

Time and temperature control is important to limit the growth of microorganisms or toxin formation; therefore, it is important that school nutrition employees follow established guidelines to maintain safe food.

SHOW SLIDE: Activity: One-Minute Challenge**ACTIVITY: One-Minute Challenge****Materials:**

- **One-Minute Challenge** worksheet
- Chart paper
- Markers

Time: 5 minutes

Instructions: Direct participants to the **One-Minute Challenge** worksheet in the Participant's Workbook. Give them 1 minute to write methods for keeping cold foods cold. Discuss and write the group's answers on a piece of chart paper. Give participants another minute to list methods for keeping hot foods hot. Discuss as a group and write answers on a piece of chart paper.

SAY: Locate the **One-Minute Challenge** worksheet in the Participant's Workbook. Take 1 minute to brainstorm ways to keep cold foods at or below 41 °F.

DO: Allow 1 minute for participants to write their answers. Discuss as a group.

ASK: What are some methods you use to keep foods at or below 41 °F?

FEEDBACK:

- Receive refrigerated foods at or below 41 °F.
- Maintain refrigerator temperatures at or below 41 °F.
- Maintain milk coolers at or below 41 °F.
- Pre-chill pans
- Prepare salads, deli sandwiches, and other foods in batches.
- Serve cold food at or below 41 °F.
- Store cold foods appropriately.
 - Refrigerators
 - Milk coolers
 - Refrigerated serving lines
 - Ice around food
 - Ice packs
 - Ice water bath

DO: Allow participants to answer. Write their answers on chart paper.

SAY: Take 1 minute to brainstorm ways to keep hot foods at or above 135 °F.

DO: Allow 1 minute for participants to write their answers. Discuss as a group.

ASK: What are some methods you use to keep foods at or above 135 °F?

FEEDBACK:

- Cook food to appropriate internal temperatures.
- Use lids to reserve heat.
- Use heat lamps.
- Store food in a warmer before serving.
- Cook food in batches near serving time (i.e., just-in-time service).
- Hold food in holding cabinets or insulated containers at or above 135 °F.
- Serve food from heated serving lines.

One-Minute Challenge

Instructions: Take 1 minute to brainstorm ways to keep foods at the proper temperature. You will have 1 minute for cold foods and 1 minute for hot foods.

How to keep cold foods at or below 41 °F

1. Receive refrigerated foods at or below 41 °F.
2. Maintain refrigerator temperatures at or below 41 °F.
3. Maintain milk coolers at or below 41 °F.
4. Pre-chill pans.
5. Prepare salads, deli sandwiches, and other foods in batches.
6. Serve cold food at or below 41 °F.
7. Store cold foods appropriately.
 - Refrigerators
 - Milk coolers
 - Refrigerated serving lines
 - Ice around food
 - Ice packs
 - Ice water bath

How to keep hot foods at or above 135 °F

1. Cook food to appropriate internal temperatures.
2. Batch cooking.
3. Use lids to reserve heat.
4. Use heat lamps.
5. Store food in a warmer before serving.
6. Cook food in batches near serving time (i.e., just-in-time service).
7. Hold food in holding cabinets or insulated containers at or above 135 °F.
8. Serve food from heated serving lines.

SAY: For more information on keeping food out of the temperature danger zone, ICN has Food Safety Fact Sheets on the *Temperature Danger Zone*, *Holding Cold Foods*, and *Holding Hot Foods* on the ICN website (theicn.org/foodsafety).

SHOW SLIDE: *Thermometers*

SAY: Controlling time and temperature is an important part of a school's food safety plan. There are standard times and temperatures for receiving, storing, cooking, holding, cooling, and reheating foods.

Thermometers are an important tool in our school nutrition programs. They assist you in keeping food safe in monitoring and assuring that critical temperatures related to food safety are met. Different thermometers are used for different situations. For example, appliance thermometers measure the temperature inside a refrigerator and a digital stemmed thermometer measures the temperature of a food. Record temperatures on their respective temperature logs when taken (i.e., receiving, cooking, cooling, etc).

SHOW SLIDE: *Calibrating Thermometers*

SAY: Thermometers are only effective if calibrated correctly. Let's walk through an example. The *Food Code* specifies to cook hamburger patties to an internal temperature of 155 °F. That recommendation is based on the temperature that destroys *E. coli* O157:H7. A cook takes the temperature of several hamburger patties and records the temperature was 155 °F. Later, it was discovered that the thermometer measures 8 °F higher than the actual temperature. This means that the hamburger patties were only cooked to 147 °F, a temperature that is too low to kill the harmful bacteria. This example points out the need for school nutrition employees to use only accurate thermometers for taking food temperatures. To ensure that thermometers are accurate, they need to be calibrated. It is ideal to calibrate thermometers daily, but calibrate them at least weekly. Calibrate thermometers if dropped or exposed to extreme temperatures.

SHOW SLIDE: *Activity: Calibrating a Thermometer: Ice Water Method*

ACTIVITY: Calibrating a Thermometer: Ice Water Method

Materials:

- *A Flash of Food Safety—Calibrating a Thermometer: Ice Water Method* video: www.fns.usda.gov/ofs/food-safety-flashes
- Computer, TV, or Projector
- Speakers
- **Ice Water Method for Thermometer Calibration** handout

Time: 10 minutes

Instructions: The trainer will show the video. Ask participants to turn to the **Ice Water Method for Thermometer Calibration** handout in the Participant's Workbook. Walk through the steps for calibrating a thermometer. Participants do not need to write anything down and should be encouraged to focus on the videos.

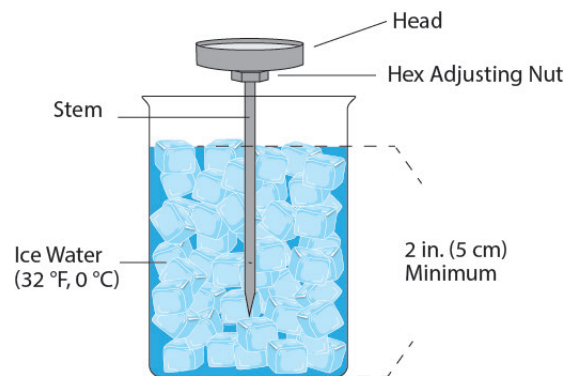
SAY: Let's take a quick look at a short video on how to calibrate a thermometer.

DO: Show the video clip. *A Flash of Food Safety - Calibrating a Thermometer: Ice Water Method*. Ask participants to turn to the **Ice Water Method for Thermometer Calibration** handout. Walk through the steps for calibrating a thermometer.

SAY: Please turn to the **Ice Water Method for Thermometer Calibration** handout. We have provided the directions for using the Ice Water Method to calibrate thermometers, but you can also calibrate a thermometer using the Boiling Water Method. Many schools may choose to use the Ice Water Method due to the safety concerns of dealing with boiling water. Each time that you calibrate a thermometer, record that you have calibrated it using a calibration log such as ICN's *Thermometer's Calibration Log*.

Ice Water Method for Thermometer Calibration

1. Fill a large container with ice.
2. Add water to within 1 inch of rim of container.
3. Stir mixture well.
4. Let sit for 1 minute.
5. Place thermometer in container so that the sensing area (dimple) of stem or probe is completely submerged.
6. Prevent thermometer from touching sides or bottom of container.
7. Let thermometer stay in ice water for 30 seconds or until the dial stops moving on a bi-metallic thermometer.
8. For a bi-metallic thermometer, place the calibration tool on the hex adjusting nut and rotate until the dial reads 32 °F, while in ice water.
9. For digital stemmed thermometers, follow the directions on the packing and press the reset button to calibrate.
10. Repeat process with each thermometer.



SAY: To avoid cross-contamination use a clean, sanitized, and calibrated thermometer. To take proper temperatures with a thermometer:

- Avoid inserting the thermometer into pockets of fat or near bones when taking internal temperatures.
- Take at least two internal temperatures from each batch of food.
- Insert the thermometer into the thickest part of the food.
- Record the temperature and the time that the temperature was checked.

ICN Resources with more information on using and calibrating thermometers include the *Using and Calibrating Thermometers Standard Operating Procedure* and the *Thermometer Information Resource*. To help train your staff in how to use a thermometer in foodborne illness prevention, please refer to *Food Safety Spotlight—Food Safety Basics: Calibrate Thermometers*.

SHOW SLIDE: Foodservice Process Steps

SAY: It is important to follow basic safe food handling practices at each step of foodservice. These steps include purchasing, receiving, storing, preparing, cooking, serving and holding, cooling, reheating, and transporting (if applicable to your facility). Basic safe food handling practices needed at each step include time and temperature control, employee personal hygiene, and prevention of contamination. We will briefly talk about the important temperatures and food handling practices associated with each of these foodservice steps. These steps must be monitored, recorded, and have corrective actions in place to ensure that the best food safety practices are being followed.

Please turn to the **Temperatures Through Food Production** handout in the Participant's Workbook. This chart provides a quick look at some of the important temperatures and best practices required during the flow of foodservice. This chart is not all-encompassing for all the foodservice steps and the best practices associated with them. For more information on the best practices during foodservice, please refer to our *Food Safety in Schools* training.

DO: Walk through the sections of the **Temperatures Through Food Production** handout asking participants if they can think of any other best practices not mentioned on the chart.

Instructor's Note: *Do not read this chart to them nor spend more than the allotted time.*

Temperatures Through Food Production

Important Temperatures	Why It's Important	Best Practices
Purchasing		
<ul style="list-style-type: none"> • Cold food: 41 °F and below • Hot food: 135 °F and below 	Buy from vendors that have good food safety practices in place to ensure the food you purchase has not been temperature abused.	<ul style="list-style-type: none"> • Buy from reputable vendors. • Include food safety standards in purchasing agreements.
Receiving		
<ul style="list-style-type: none"> • Refrigerated food: 41 °F and below • Frozen food: at or below 32 °F • Hot food: held at or above 135 °F 	<p>Cold foods must be received at 41 °F or below so that it is not in the temperature danger zone. Frozen food must be frozen and contain no ice crystals. Ice crystals are a sign that the food has been thawed and refrozen.</p>	<ul style="list-style-type: none"> • Keep receiving area clean. • Inspect the delivery truck. Make sure it is clean and free of odors. • Check food temperatures, paying particular attention to frozen and refrigerated products. • Look for signs of contamination and container damage. Reject damaged packages; their contents may also be contaminated or damaged. • Check for separation of raw and ready-to-eat or prepared foods during transport. • Store foods immediately.
Storing		
<ul style="list-style-type: none"> • Dry storage areas: between 50 °F and 70 °F • Refrigerated storage areas: at or below 41 °F • Deep chilling storage areas: between 26 °F and 32 °F • Freezer storage areas: between -10 °F and 0 °F 	<p>Storing food out of the temperature danger zone assists in preserving food quality and decreases the likelihood of bacterial growth. However, dry storage items are shelf stable in the temperature danger zone because bacteria present in the sealed container is eliminated during processing.</p>	<ul style="list-style-type: none"> • Use the first-in, first-out (FIFO) principle. Use older products first. • Store products in original packaging. Label foods with delivery date. • Keep raw foods separate from cooked or ready-to-eat products. • Store foods at least 6 inches off the floor and 6 inches away from the wall. • Keep storage areas clean, dry, and pest-free. • Store chemicals away from foods and food-related supplies. • Maintain, monitor, and record refrigerator, freezer, and dry storage room temperatures.

Temperatures Through Food Production

Important Temperatures	Why It's Important	Best Practices
Preparing		
<ul style="list-style-type: none"> • Pre-chill ingredients for cold foods to 41 °F or below before combining with other ingredients. • Limit the preparation time of any ingredients to no more than 30 minutes at room temperature before cooking, serving, or returning to the refrigerator. 	<p>These methods prevent food from being in the temperature danger zone too long.</p>	<ul style="list-style-type: none"> • Wash hands frequently, properly, and at appropriate times. • Avoid cross-contamination. • Keep foods out of the temperature danger zone. • Use batch cooking to limit the time between preparation and service. • Thaw foods properly. • Chill all cold foods as quickly as possible. • Prepare foods as close to serving time as the menu will allow.
Cooking		
<ul style="list-style-type: none"> • 165 °F – poultry, stuffing, stuffed meats, stuffed pasta, casseroles, leftovers • 155 °F – ground meats, such as hamburger, ground pork, sausage, eggs for hot holding • 145 °F – beef roasts, pork roasts, beef steaks, ham, fish • 135 °F – ready-to-eat foods taken from a commercially processed, hermetically sealed package; vegetables (frozen or canned) 	<p>Cooking foods to the correct internal temperature will destroy existing bacteria, even though it may not kill toxins or bacterial spores.</p>	<ul style="list-style-type: none"> • Avoid cross-contamination. • Cook foods to the proper internal temperature for appropriate time. • Use a clean and calibrated food thermometer. • Record internal food temperature.

Temperatures Through Food Production

Important Temperatures	Why It's Important	Best Practices
Holding and Serving		
<ul style="list-style-type: none"> • Cold food: held at or below 41 °F • Hot food: held at or above 135 °F 	<p>These temperatures keep food out of the temperature danger zone and prevent pathogen growth.</p>	<ul style="list-style-type: none"> • Avoid cross-contamination. • Keep foods out of the temperature danger zone. • Monitor and record food temperatures. • Monitor the temperature of hot holding and cold-holding equipment.
Cooling		
<ul style="list-style-type: none"> • Hot food must be cooled from 135 °F to 70 °F within 2 hours. If not, the food must be reheated to 165 °F for 15 seconds or discarded. • Food must be cooled within a total of 6 hours from 135 °F to 41 °F (if step one is achieved). • Foods that start at room temperature (70 °F) must be cooled to 41 °F within 4 hours. 	<p>These are the time and temperature regulations specified by the Food Code to safely cool foods in order to prevent bacterial growth.</p>	<ul style="list-style-type: none"> • Speed up cooling by using techniques such as: <ul style="list-style-type: none"> ▪ Stirring frequently ▪ Dividing food into small quantities ▪ Using shallow pans ▪ Using ice water baths or ice paddles whenever possible • Use a clean and calibrated food thermometer to check temperatures. • Monitor and record food temperatures during the cooling process. • Store foods appropriately — covered, labeled with product name and date prepared.

Temperatures Through Food Production

Important Temperatures	Why It's Important	Best Practices
Reheating		
<ul style="list-style-type: none"> • 165 °F for 15 seconds within 2 hours 	<p>This is the temperature and time required to kill any bacteria that may be present in the food.</p>	<ul style="list-style-type: none"> • Reheat to internal temperature of 165 °F for 15 seconds within 2 hours of less. • Monitor and record internal temperatures of foods. • Never reheat food in hot holding equipment. • Recommended to reheat food one time; quality diminishes each time.
Transporting		
<ul style="list-style-type: none"> • Refer to temperatures for holding 		

CLEANING AND SANITIZING

Objective: Describe appropriate methods for cleaning and sanitizing.

SHOW SLIDE: *Cleaning and Sanitizing*

SAY: A clean and sanitary work space is needed to keep a food operation safe. Cleaning and sanitizing is important to reduce the opportunity for bacteria and viruses to contaminate food and remove allergens from a surface. Cleaning with warm, soapy water and scrubbing to provide friction removes allergens. Sanitizing helps kill microorganisms. Now we will discuss how to manually clean and sanitize and how to prepare chemical sanitizing solutions.

SHOW SLIDE: *Manual Cleaning and Sanitizing*

SAY: There are four steps to proper cleaning and sanitizing for food contact surfaces:

Step 1: Wash/scrub surface with detergent solution to clean.

Step 2: Rinse surface with clean water to remove debris and detergent.

Step 3: Sanitize surface using a sanitizing solution safe for food contact surfaces and mixed at the concentration specified on the manufacturer's label.

Step 4: Allow items to air-dry.

These steps are effective at preventing some instances of food contamination. The washing/scrubbing and rinsing steps are effective at removing an allergen from a food contact surface. Washing and rinsing steps are also important preventative steps of cross-contamination because they remove food particles that would make sanitizer ineffective. The sanitizer step, when done properly, can reduce the chances of chemical and cross-contamination.

SHOW SLIDE: Chemical Concentrations

SAY: Sanitizing solutions lose effectiveness when they are contaminated with food particles or with detergent. If the chemical sanitizer is prepared to the proper concentration, the sanitizer will not form a residue and will be effective. There are three approved sanitizers for foodservice: chlorine, quaternary ammonium, and iodine.

The concentration of sanitizers is measured in parts per million (ppm). Requirements are:

- Chlorine—50–100 ppm at 75 °F
- Quaternary Ammonium—follow manufacturer's instructions
- Iodine—12.5–25 ppm at 75 °F

It is important to follow the manufacturer's recommendations for how long a sanitizer will be effective over time. Use test strips to test the concentration of the sanitizers to ensure that they are strong enough to kill bacteria, but not so strong as to damage equipment materials.

For cross-contamination, a properly prepared sanitizer is effective in killing microorganisms that may be on that surface. Air-drying is also important to prevent cross-contamination as you reduce the risk of reintroducing microorganisms from a drying cloth.

Please turn in the Participant's Workbook to the **Cleaning and Sanitizing Food Contact Surfaces (Sample SOP)** handout. This sample SOP provides more details on cleaning and sanitizing different types of equipment and surfaces. Adapt this SOP to your school district's needs.

Cleaning and Sanitizing Food Contact Surfaces (Sample SOP)

PURPOSE: To prevent foodborne illness by ensuring that all food contact surfaces are properly cleaned and sanitized.

SCOPE: This procedure applies to school nutrition employees involved in cleaning and sanitizing food contact surfaces.

KEY WORDS: Food Contact Surface, Cleaning, Sanitizing

INSTRUCTIONS:

1. Train school nutrition employees on using the procedures in this SOP.
2. Follow State or local health department requirements.
3. Follow manufacturer's instructions regarding the use and maintenance of equipment and use of chemicals for cleaning and sanitizing food contact surfaces. Refer to Storing and Using Poisonous or Toxic Chemicals SOP.
4. If State or local requirements are based on the FDA *Food Code*, wash, rinse, and sanitize food contact surfaces of sinks, tables, equipment, utensils, thermometers, carts, and equipment:
 - Before each use.
 - Between uses when preparing different types of raw animal foods, such as eggs, fish, meat, and poultry.
 - Between uses when preparing ready-to-eat foods and raw animal foods, such as eggs, fish, meat, and poultry.
 - Any time contamination occurs or is suspected.
5. Wash, rinse, and sanitize food contact surfaces of sinks, tables, equipment, utensils, thermometers, carts, and equipment using the following procedure:
 - Wash surface with detergent solution.
 - Rinse surface with clean water.
 - Sanitize surface using a sanitizing solution mixed at a concentration specified on the manufacturer's label.
 - Place wet items in a manner to allow air-drying.

6. If a 3-compartment sink is used, setup and use the sink in the following manner:
 - In the first compartment, wash with a clean detergent solution at or above 110 °F or at the temperature specified by the detergent manufacturer.
 - In the second compartment, rinse with clean water.
 - In the third compartment, sanitize with a sanitizing solution mixed at a concentration specified on the manufacturer's label or by immersing in hot water at or above 171 °F for 30 seconds. Test the chemical sanitizer concentration by using an appropriate test kit.
7. If a dishmachine is used:
 - Check with the dishmachine manufacturer to verify that the information on the data plate is correct.
 - Refer to the information on the data plate for determining wash, rinse, and sanitization (final) rinse temperatures; sanitizing solution concentrations; and water pressures, if applicable.
 - Follow manufacturer's instructions for use.
 - Ensure that food contact surfaces reach a surface temperature of 160 °F or above if using hot water to sanitize.

MONITORING:

School nutrition employees will:

1. During all hours of operation, visually and physically inspect food contact surfaces of equipment and utensils to ensure that the surfaces are clean.
2. In a 3-compartment sink, on a daily basis:
 - Visually monitor that the water in each compartment is clean.
 - Take the water temperature in the first compartment of the sink by using a calibrated thermometer.
 - If using chemicals to sanitize, test the sanitizer concentration by using the appropriate test kit for the chemical.
 - If using hot water to sanitize, use a calibrated thermometer to measure the water temperature. It should be at or above 171 °F. Refer to *Using and Calibrating Thermometers SOPs*.
3. In a dishmachine, on a daily basis:
 - Visually monitor that the water and the interior parts of the machine are clean and free of debris.
 - Continually monitor the temperature and pressure gauges, if applicable, to ensure that the machine is operating according to the data plate.

- For hot water sanitizing dishmachine, ensure that food contact surfaces are reaching the appropriate temperature at or above 160 °F by placing a piece of heat sensitive tape on a smallware item or an irreversible registering temperature indicator on a rack and running the item or rack through the dishmachine.
- For chemical sanitizing dishmachine, check the sanitizer concentration on a recently washed food-contact surface using an appropriate test kit.

CORRECTIVE ACTION:

1. Retrain any school nutrition employee found not following the procedures in this SOP.
2. Wash, rinse, and sanitize dirty food contact surfaces. Sanitize food contact surfaces if it is discovered that the surfaces were not properly sanitized. Discard food that comes in contact with food contact surfaces that have not been sanitized properly.
3. In a 3-compartment sink:
 - Drain and refill compartments periodically and as needed to keep the water clean.
 - Adjust the water temperature by adding hot water until the desired temperature is reached.
 - Add more sanitizer or water, as appropriate, until the proper concentration is achieved.
4. In a dishmachine:
 - Drain and refill the machine periodically and as needed to keep the water clean.
 - Contact the appropriate individual(s) to have the machine repaired if the machine is not reaching the proper wash temperature indicated on the data plate.
 - For a hot water sanitizing dishmachine, retest by running the machine again. If the appropriate surface temperature is still not achieved on the second run, contact the appropriate individual(s) to have the machine repaired. Wash, rinse, and sanitize in the 3-compartment sink until the machine is repaired or use disposable single service/single-use items if a 3-compartment sink is not available.
 - For a chemical sanitizing dishmachine, check the level of sanitizer remaining in bulk container. Fill, if needed. "Prime" the machine according to the manufacturer's instructions to ensure that the sanitizer is being pumped through the machine. Retest. If the proper sanitizer concentration level is not achieved, stop using the machine and contact the appropriate individual(s) to have it repaired. Use a 3-compartment sink to wash, rinse, and sanitize until the machine is repaired.

VERIFICATION AND RECORD KEEPING:

School nutrition employees will record monitoring activities and any corrective action taken on the *Food Contact Surfaces Cleaning and Sanitizing Log*. The school nutrition manager will verify that school nutrition employees have taken the required temperatures and tested the sanitizer concentration by visually monitoring school nutrition employees during the shift and reviewing, initialing, and dating the *Food Contact Surfaces Cleaning and Sanitizing Log*. The log will be kept on file for at least 1 year. The school nutrition manager will complete the *Food Safety Checklist* daily. The Food Safety Checklist is to be kept on file for a minimum of 1 year.

DATE IMPLEMENTED: _____ **BY:** _____

DATE REVIEWED: _____ **BY:** _____

DATE REVISED: _____ **BY:** _____

SAY: For more information on proper cleaning and sanitizing, please refer to our *Food Safety in Schools* training. To help train your staff in foodborne illness prevention, please refer to *Food Safety Spotlight - Correctly Preparing Sanitizer*.

DEVELOP A FOOD SAFETY PROGRAM

Objective: Describe the components of an effective food safety program.

SHOW SLIDE: *Food Safety Programs*

SAY: The Child Nutrition Reauthorization Act of 2004 implemented the requirement for a food safety program based on Hazard Analysis and Critical Control Point (HACCP) principles for school nutrition programs. In 2010, the Richard B. Russell National School Lunch Act was amended and included the food safety requirements established in the Healthy, Hunger-Free Kids Act of 2010 and the Child Nutrition and WIC Reauthorization Act of 2004. It requires School Food Authorities (SFAs) to implement a food safety program based on HACCP principles. This food safety program must apply to all locations where food is stored, prepared, or served throughout the school. The food safety principles outlined in the U.S. Department of Agriculture (USDA) guidance for implementation of comprehensive food safety programs in schools participating in the National School Lunch Program (NSLP) need to be included in the food safety program.

There are two components of a food safety program:

1. Written Standard Operating Procedures
2. Written food safety program for each school based on the Process Approach to HACCP

Standard operating procedures provide guidance for non-specific hazards. Written SOPs provide a guide of practices and procedures that give direction to school nutrition employees on critical tasks for keeping food safe. This would address general food safety practices for each step in the foodservice process (purchasing, receiving, storing, preparing, cooking, serving and holding, cooling, reheating, and transporting).

SOPs provide the foundation for the food safety program, and support use of the Process Approach. An SOP should include the following information:

- Purpose
- Temperature control points
- Instructions
- Monitoring procedures
- Corrective actions
- Suggested record keeping documents
- Verification procedures

DO: Ask participants to turn to the **Reheating Time and Temperature Control for Safety Foods (Sample SOP)** handout.

Reheating Time and Temperature Control for Safety Foods (Sample SOP)

PURPOSE: To prevent foodborne illness by ensuring that all foods are reheated to the appropriate internal temperature.

SCOPE: This procedure applies to school nutrition employees who prepare or serve food.

KEY WORDS: Cross-contamination, Temperatures, Reheating, Holding, Hot Holding, Time/Temperature Control for Safety Foods, TCS Foods

INSTRUCTIONS:

1. Train school nutrition employees on using the procedures in this SOP. Refer to the Using and Calibrating Thermometers SOP.
2. Follow State or local health department requirements.
3. If State or local requirements are based on the FDA *Food Code*, heat processed, ready-to-eat foods from a package or can, such as canned green beans or prepackaged breakfast burritos, to an internal temperature of at least 135 °F for 15 seconds for hot holding.
4. Reheat the following products to 165 °F for 15 seconds:
 - Any food that is cooked, cooled, and reheated for hot holding
 - Leftovers reheated for hot holding
 - Products made from leftovers, such as soup
 - Precooked, processed foods that have been previously cooled
5. Reheat food for hot holding in the following manner if using a microwave oven:
 - Heat processed, ready-to-eat foods from a package or can to at least 135 °F for 15 seconds
 - Heat leftovers to 165 °F for 15 seconds
 - Rotate (or stir) and cover foods while heating
 - Allow to sit for 2 minutes after heating
6. Reheat all foods rapidly. The total time the temperature of the food is between 41 °F and 165 °F may not exceed 2 hours.
7. Serve reheated food immediately or transfer to an appropriate hot holding unit.

MONITORING:

School nutrition employees will:

1. Use a clean, sanitized, and calibrated probe thermometer.
2. Take at least two internal temperatures from each pan of food.

CORRECTIVE ACTION:

1. Retrain any school nutrition employee found not following the procedures in this SOP.
2. Continue reheating and heating food if the internal temperature does not reach the required temperature.

VERIFICATION AND RECORD KEEPING:

School nutrition employees will record product name, time, the two temperatures/times, and any corrective action taken on the *Cooking and Reheating Temperature Log*. School nutrition manager will verify that school nutrition employees have taken the required reheating temperatures by visually monitoring school nutrition employees during the shift and reviewing, initialing, and dating the *Cooking and Reheating Temperature Log* at the close of each day. The temperature logs are kept on file for a minimum of 1 year.

DATE IMPLEMENTED: _____ **BY:** _____

DATE REVIEWED: _____ **BY:** _____

DATE REVISED: _____ **BY:** _____

SAY: Please use this SOP as a reference as we walk through the parts of the SOP. The key sections in a SOP are purpose, instructions, monitoring, corrective actions, and verification and record keeping.

- **Purpose statement** indicates why the SOP is important and how it fits into the food safety program. In the example, the purpose is to prevent foodborne illness by ensuring that all foods are reheated to the appropriate internal temperature.
- **Scope** of the SOP details people, activities, and equipment to which the SOP would pertain.
- **Key words** provide an at-a-glance idea of the topics covered in the SOP.
- **Instructions** provide a step-by-step description of procedures that should be followed.
- **Monitoring** is the process of checking to make sure that an operation is following SOPs and meeting important times and temperatures for food. Documenting temperatures and times is part of the monitoring process.
- **Corrective Actions** are specific, pre-planned actions that must be taken if a SOP is not followed or if a time and temperature is not met. For example, if a cooking temperature is not met, additional cooking would be needed.
- **Record Keeping** is needed to document monitoring and corrective actions taken. Records should be retained for 1 year (or longer if required by your state).
- **Verification** is the procedure that confirms that a food safety program is working according to plan. The supervisor or kitchen manager plays an important role in verification by checking and ensuring that monitoring and documentation is done. The verification process will identify changes that need to be made in the food safety program so that it will be effective.

ICN provides a variety of sample SOPs like the *Reheating Time and Temperature Control for Safety Foods (Sample)* that you can find in the Participant's Workbook. To find them on the ICN website, go to the theicn.org/foodsafety. It is important to tailor SOPs to your personal school nutrition program. For example, if your operation only has a three compartment sink, it would not be necessary to have information on using a dishmachine in your cleaning and sanitizing SOP. ICN makes them available in Word for this purpose.

SAY: You also need to revisit your food safety plan regularly to verify that the components are still relevant to your school nutrition program. It is essential to train all school employees on SOPs annually to help them understand their responsibilities in the school nutrition program in maintaining a safe food environment. To help train your staff in foodborne illness prevention, please refer to *Food Safety Spotlight–Food Safety Basics: Standard Operating Procedures*.

SHOW SLIDE: HACCP

SAY: HACCP is a specific approach to identifying measurable food safety hazards. It involves finding potential food safety issues in your school nutrition program and implementing preventative measures for each hazard. Combined with SOPs, a food safety program based on HACCP principles will prevent, eliminate, or reduce the occurrence of foodborne illness risk factors. SOPs control non-specific hazards; HACCP controls specific, measurable hazards.

SHOW SLIDE: HACCP Principles

SAY: HACCP is a specific approach for identifying food safety hazards. It involves finding potential food safety issues in your program and implementing preventative measures. In the Participant's Workbook, locate the **HACCP Principles** handout. This may be helpful as we discuss these in the upcoming example.

HACCP Principles

Completed Comments

1. Conduct a Hazard Analysis

How is the menu item prepared? _____

Prepared and served without cooking _____

Prepared and cooked for same day service _____

Prepared, cooked, held, reheated and served _____

Check your menu:

What items are similarly prepared? _____

What items are TCS foods? _____

Where is the food safety hazard during the process? _____

Where may a food safety hazard occur for each item? _____

2. Determine Critical Control Points (CCPs)

Find points in the process where hazards can be prevented, eliminated, or reduced to safe levels. _____

Some foods may have more than one. _____

3. Establish Critical Limits

Minimum or maximum limit that must be met to prevent, eliminate, or reduce the hazard to a safe level. _____

4. Establish Monitoring System

Determine the best way to check procedures and monitor for consistency. _____

Identify who will monitor and how often. _____

HACCP Principles

	Completed	Comments
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5. Identify Corrective Actions

Establish steps that must be taken when a critical limit is not met.

6. Keep Records

Maintain your HACCP plan.

Maintain all documentation during the HACCP creation process.

Keep all records:

Monitoring activities

Corrective action

Equipment is in working condition

Working with suppliers

7. Review and verify your overall food safety program periodically

Is your plan working as intended?

Plan to evaluate:

Monitoring charts

Records

How you performed your hazard analysis

Review all records when updating HACCP plan

SAY: There are seven steps or principles to HACCP.

1. Conduct a hazard analysis.
2. Determine critical control points (CCPs).
3. Establish critical limits.
4. Establish monitoring systems.
5. Identify corrective actions.
6. Keep records.
7. Review and verify your overall food safety program periodically.

The first step is to thoroughly inspect your school nutrition operation and analyze it for hazards that are present in your operation. These hazards could be biological, such as bacteria from raw meat; chemical, such as sanitizer being stored above food in the dry storage; and physical, such as fingernail polish from an employee. It is important to think through your entire foodservice production from delivery to service for any potential hazards.

Once the hazard analysis is complete, the next step is to establish measures to prevent them. The key application of HACCP principles is using critical control points and critical limits to monitor and control the identified hazards. Critical control points, or CCPs, are the points in the foodservice operation where there is an identified potential hazard that is not already controlled by an SOP. Critical control points provide control during preparation, cooking, holding, serving, cooling, and reheating. Critical limits are the measures taken to eliminate, prevent, or reduce the food safety hazard identified by the CCP.

SHOW SLIDE: HACCP Example

SAY: For example, you identify that a recipe contains raw ground beef; this means there is a potential bacterial hazard from undercooked meat causing a foodborne illness. This becomes a critical control point for this recipe. The critical limit for this recipe is that ground beef must be cooked to a minimum of 155 °F to ensure it reaches the appropriate internal temperature to kill the bacterial hazard. The CCP may be in multiple steps in the foodservice process: cooking, holding, reheating, etc.

ASK: What are some potential critical control points you can think of in your school nutrition program, and what critical limits would you put into place to eliminate them?

FEEDBACK:

- Delivered cold food
 - CCP: If cold food is delivered in the temperature danger zone, there is the potential for bacterial growth
 - Critical limit: cold food must be delivered at 41 °F or below
- Hot holding foods before service
 - CCP: Food held in the temperature danger zone allows bacterial growth
 - Critical limit: keep hot food at 135 °F or higher to keep it out of the temperature danger zone

SAY: Those are very good examples of determining hazards, figuring out critical control points, and establishing critical limits to reduce or eliminate the hazard. The HACCP principles do not stop here though. After figuring out where hazards exist and how to control them, it is essential to create a monitoring program with written corrective actions in case a critical limit has not been met; these are the next two principles. Returning to our earlier example of raw ground beef in a recipe, an employee should monitor the food by using a thermometer to take the temperature to ensure that it reaches 155 °F. If during the monitoring process it is determined that the food is only 145 °F, the corrective action is to return the food to the oven to continue cooking until it has reached the required temperature.

The next step of HACCP involves recording your procedures concerning critical control points. It is vital to write down all monitoring performed and corrective actions taken. It is important to have documentation of food safety practices because in the case of a foodborne illness outbreak, if it was not recorded, it did not happen. You need documentation of procedures when trying to determine the cause of a foodborne illness or an allergic reaction. You can use logs to help monitor and document your food safety practices.

You may recall that the **Reheating Time and Temperature Control for Safety Foods (Sample SOP)** handout provided verification and record keeping instructions on how to use a log for documentation. An example log to use could be ICN's *Cooking and Reheating Temperature Log*. The log provides instructions for monitoring and recording food temperature as you cook or reheat it. You also record the date and time, food item, internal cooking temperatures, corrective actions, employee initials, and verifying person. This is all important information to have in the case of a foodborne illness outbreak.

Returning to our earlier example of the ground beef recipe and using this log, the employee should record the time and date they took the temperature and the food item they were checking. The employee would also record the temperature reading (145 °F), along with the corrective action of placing the food back into the oven for further cooking when it was determined that the recipe did not meet the correct critical limit. The employee would then initial the log and follow up with their manager or director.

The final step for using HACCP principles in your food safety program is to review and verify that the procedures put into place are working. It is important to routinely verify that your food safety program is working. This could include talking to staff, checking logs, and testing established food safety best practices. This step helps identify any problems or practices that may need to be revised.

SHOW SLIDE: The Process Approach to HACCP

SAY: Now that we have a clear understanding of the HACCP principles, we will discuss the Process Approach to HACCP. The Food and Drug Administration (FDA) developed a process approach to implementing HACCP programs. This approach was adopted and modified by USDA when they developed guidance for developing school food safety programs.

The Process Approach categorizes menu items into three broad preparation processes, based on the number of times food passes through the temperature danger zone. The three categories are No Cook, Same Day Service, and Complex. No Cook menu items never pass through the temperature danger zone. Same Day Service items pass through the temperature danger zone once. Complex food items pass through the temperature danger zone at least twice but may pass through it more. It is important that school nutrition employees monitor and control food temperatures at various steps in the foodservice process to ensure food safety. We are going to review each process and walk a food item through the HACCP principles.

SHOW SLIDE: Process 1: No Cook Step

SAY: No Cook menu items do not enter the temperature danger zone. An example of a No Cook item would be fruit salad as it is never cooked, and therefore, does not pass through the temperature danger zone. The CCP for the fruit salad would be at the holding step where the temperature needs to be kept at 41 °F or below.

SHOW SLIDE: Process 2: Same Day Service

SAY: Same Day Service menu items enter the temperature danger zone one time. These foods are prepared hot and served hot on the same day. They pass through the temperature danger zone while they are being prepared. An example of a Same Day Service food item would be baked chicken breast. There would be two CCPs. They are cooked to 165 °F, passing through the temperature danger zone. The chicken would then be held for serving at 135 °F or above to make sure they do not fall into the temperature danger zone.

SHOW SLIDE: Process 3: Complex Preparation

SAY: Complex menu items pass through the temperature danger zone at least twice, but possibly more times depending on how the food is prepared. These food items may be prepared hot then cooled, but also may be reheated which would take them through the temperature danger zone a third time. An example would be beef and bean tamale pie. This food item travels through the temperature danger zone three times as it is cooked, cooled, and then reheated. There are four CCP's for this food item at the cooking, cooling, reheating, and holdings steps.

Depending on your SNP, the same recipe may fall into different categories. Preparation steps or equipment used may change the process for foods considered Same Day Service in some schools and Complex in other schools. For example, chili prepared with dried beans that are cooked the day before, cooled, and then reheated the next day for service would be considered a Complex food. However, if the chili recipe uses canned beans and everything is cooked for service the same day, it would be considered a Same Day Service Process food item.

We are now going to do an activity where we categorize food items into the different process approaches.

SHOW SLIDE: Activity: Menu Items by Process Category**ACTIVITY: Menu Items by Process Category**

Materials: Menu Items by Process Category worksheet

Time: 10 minutes

Instructions: Have participants turn to the **Menu Items by Process Category** worksheet. Divide them into 4 teams. Have each team decide which process category the menu item would belong to: No Cook, Same Day Service, or Complex.

In the blank lines of the chart, have participants identify some commonly served items from their school or district. Enter the menu item and mark the appropriate process category box. Discuss items that might be placed into a different process, depending on the process used in a particular school.

SAY: Please turn to the **Menu Items by Process Category** worksheet in the Participant's Workbook. I am going to divide you into 4 teams. Each team will decide which process category the menu item would belong to: No Cook, Same Day Service, or Complex. In the blank chart, identify some commonly served items from your school or district. Enter the menu item and mark the appropriate process category box.

DO: Divide participants in 4 groups. Allow them 5 minutes to complete the worksheet. Discuss the answers and how menu items might be placed into a different process, depending on the process used in a particular school.

Menu Items by Process Category

Instructions: Place each menu item in a Process Approach Category. In the blank boxes, try a few of your own items from your school or district. Enter the menu item and mark the appropriate box.

Menu Item	No Cook	Same Day Service	Complex Food Preparation
Egg patty		X	
Milk	X		
Nachos with meat and cheese		X	X
Stacked turkey with Swiss on bun	X		X
Seasoned corn		X	
Baked potato wedges		X	
Breakfast pizza		X	
Hot dogs		X	
Lettuce	X		
Spaghetti sauce		X	X
Tacos		X	X
Bean burritos		X	
Cole slaw	X		
Baked beans		X	
French toast sticks		X	
Sliced baked turkey		X	X

SAY: These food items may fall under more than one category depending on the specific preparation process.

- Nachos with meat and cheese – same day or complex, depending on practices followed in specific foodservice operation
- Stacked turkey with Swiss on bun – could be same day or complex if turkey was cooked and cooled and sliced in the operation
- Spaghetti sauce – could be same day or complex, depending when the meat is cooked
- Tacos – could be same day or complex, depending when the meat is cooked
- Bean burritos – same day if it is a frozen product

DO: Ask groups to report on their answers.

SAY: For more information on the Process Approach, please refer to USDA's *Developing a Food Safety Program Using the Process Approach*. To help train your staff in foodborne illness prevention, please refer to *Food Safety Spotlight—Food Safety Basics: The Process Approach: No Cook*, *The Process Approach: Same Day Service*, and *The Process Approach: Complex* (www.theicn.org/foodsafety).

On ICN's website, theicn.org/foodsafety, you can find many valuable food safety resources and numerous SOPs. Please explore, print, and use these in your SNP.

ASK: Are there any questions?

WRAP UP

SHOW SLIDE: Food Safety Resources

SAY: Food safety is such an important topic that we could have spent days covering this critical area. However, we have given you a brief overview of the importance of food safety, personal hygiene practices, important food safety temperatures, proper cleaning and sanitizing, and creating a food safety program in your school. We encourage you to seek more education on this topic and to use the resources available to you through your local and State departments, USDA, and ICN.

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.

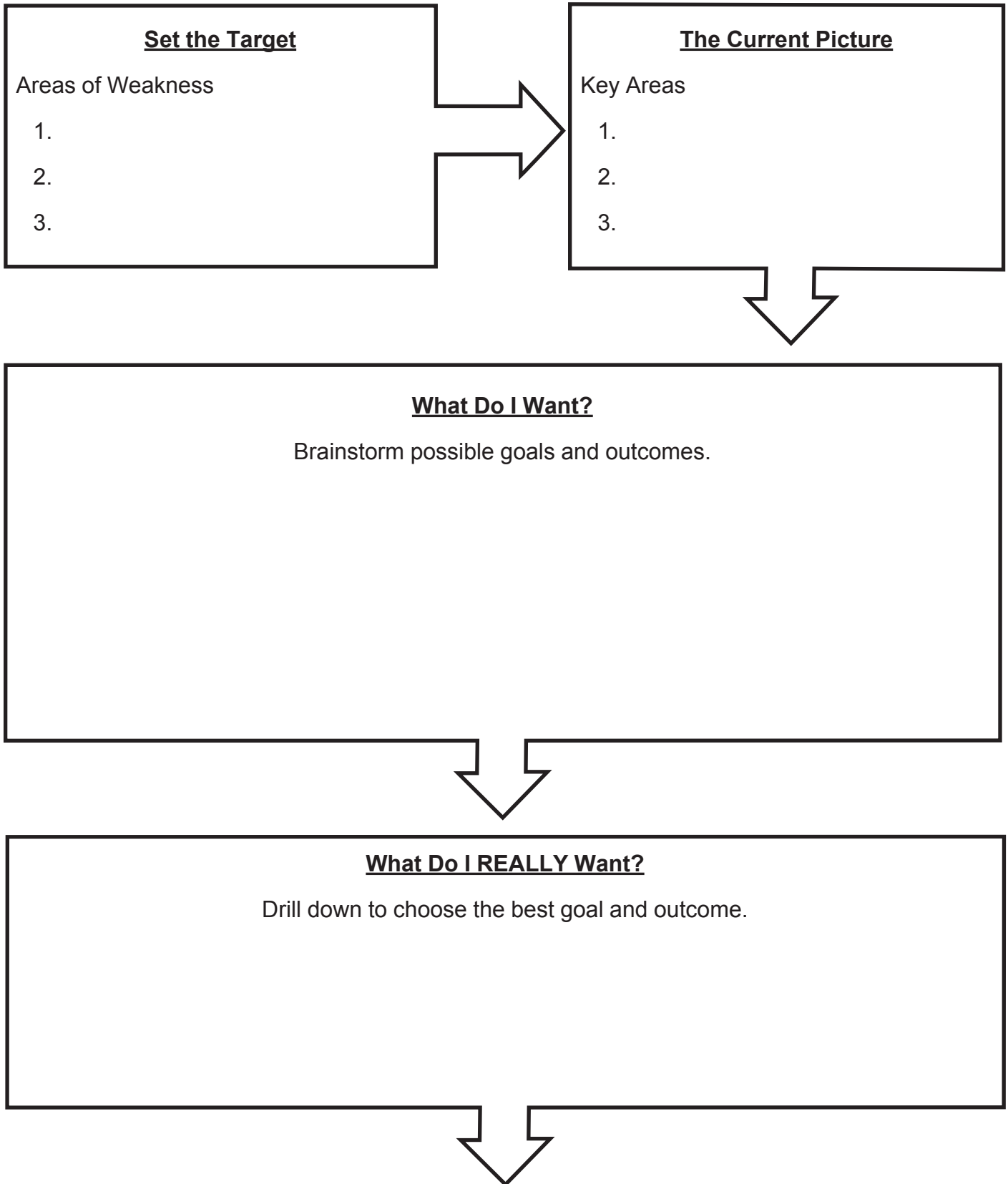
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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 safety. 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 goals using the **SMART Goals for Food Safety** worksheet.

SMART Goals for Food Safety



SMART Goals for Food Safety, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

Workplace Safety and Emergency Preparedness for Introduction to School Nutrition Leadership

Instructor's Manual

Time: 1 ¼ hours



Key Area: 3 (Administration)

USDA Professional Standards Codes: 3240, 3450

2022

01/24/2022

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
Objective: Describe the role of the school nutrition program in emergency preparedness.			
30 minutes	<ul style="list-style-type: none"> • Role of the School Nutrition Director • Food Recalls • Biosecurity for SNPs • Emergency Preparedness Planning Matrix • Wrap Up • Conclusion – SMART Goals 	<ul style="list-style-type: none"> • When You Least Expect It • What Is Emergency Preparedness? and Steps in Developing an Emergency Preparedness Plan • Emergency Preparedness Planning Matrix 	<ul style="list-style-type: none"> • Participant's Workbook • <i>What Is Emergency Preparedness?</i> handout • <i>Steps in Developing an Emergency Preparedness Plan</i> handout • <i>Handling a Food Recall Template (Sample SOP)</i> handout • <i>Emergency Preparedness Planning Matrix</i> handout
Total: 1 ¼ hours			

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.

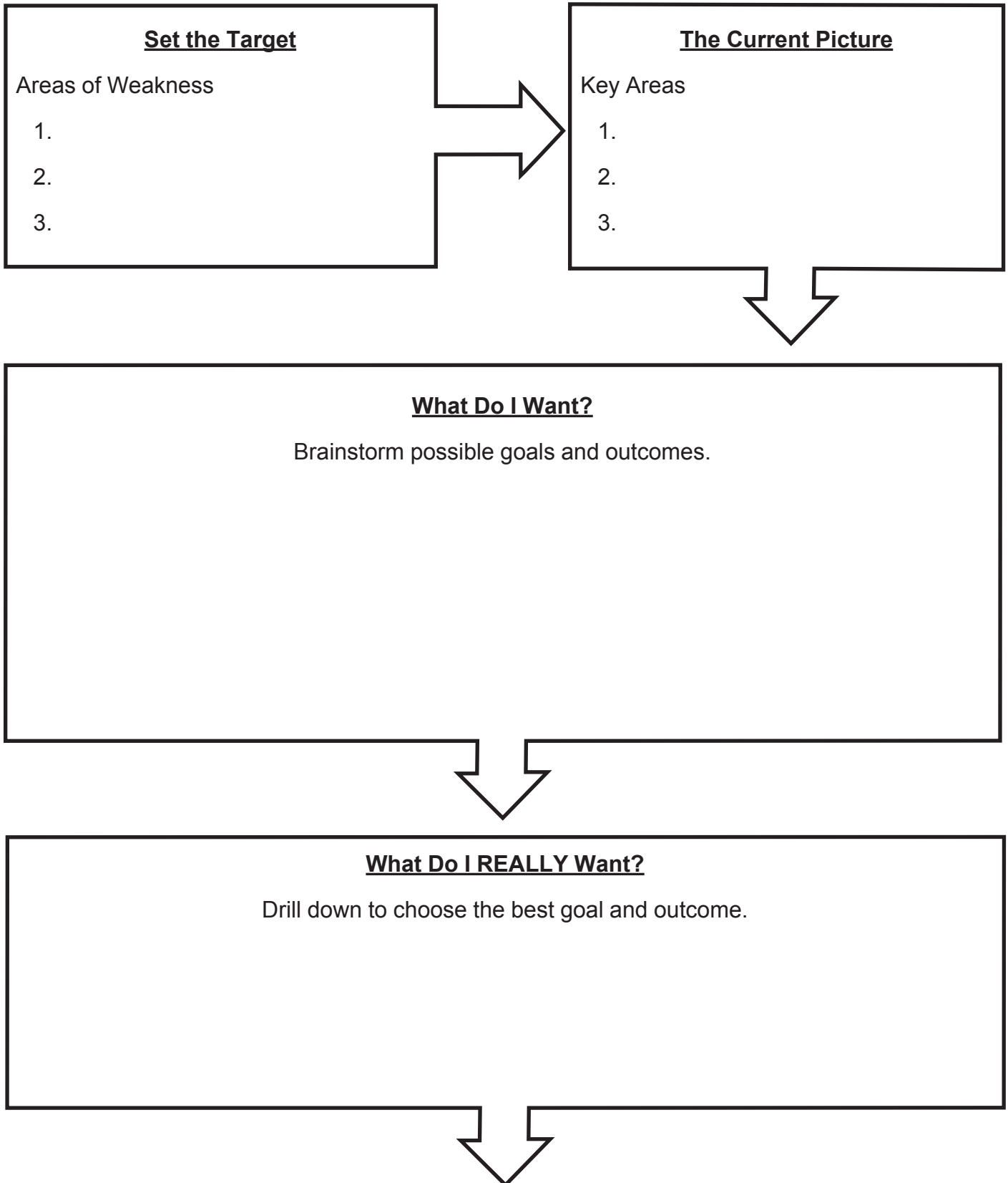
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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



SMART Goal for Workplace Safety, 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> 	

Emergency Preparedness

SHOW SLIDE: Emergency Preparedness

Objective: Describe the role of the school nutrition program in emergency preparedness.

SAY: Emergency preparedness is a systematic approach for conducting a risk analysis of the school nutrition operation through prevention, preparedness, response, and recovery.

Here we will talk about the role of the SNP in emergency preparedness. We will also point you to some resources which you can use to determine how you and your staff will respond to an emergency. Emergency situations in SNPs come without warning and can vary in intensity from one location to the next. For example, the normal work routine may be disrupted by a water main leak, an ice storm, or a food recall. Let's look in your workbook at the list of your responsibilities as a director.

ROLE OF THE SCHOOL NUTRITION DIRECTOR

SAY: The school nutrition director is the leader of the SNPs in the district. Leadership brings responsibility, and one of those responsibilities is to protect the program and ensure its viability through effective emergency preparedness practices, including but not limited to:

- Implementing regulations and requirements applicable to emergency preparedness
- Leading and modeling calm behavior in an emergency situation
- Supervising the development, implementation, and evaluation of emergency preparedness plan in each school. While the actual implementation of the emergency preparedness plan may be activated district-wide or be specific to an individual school, the director must be able to do the following:
 - Understand the chain of command
 - Communicate plans and procedures, including the ability to integrate communication tools that are in place with local response agencies, such as police, fire, homeland security, and emergency personnel
 - Establish standards and procedures that will ensure sanitation and safety for the duration of the emergency
 - Monitor inventory of food, equipment, and supplies
 - Establish and maintain ongoing staff training on the emergency preparedness plan
 - Evaluate and update emergency preparedness procedures routinely

SHOW SLIDE: Activity: When You Least Expect It**ACTIVITY: When You Least Expect It**

Materials: chart paper

Time: 10 minutes

Instructions: Label chart paper ahead of time with, "When You Least Expect It." Have participants talk about an unanticipated event that caused a chaotic or dysfunctional situation in their school nutrition operation.

SAY: Let's begin our lesson by thinking of instances of a disaster related to your SNP.

ASK: Can a director that has had experience with an unexpected event begin our discussion by telling us about an unanticipated event that caused a chaotic or dysfunctional situation? Who else can give an example?

DO: Allow time for discussion. Then, ask the responding participant to serve as secretary for the group and write other responses on the chart paper.

FEEDBACK:

Disaster situations include the following:

- Active shooter
- Bioterrorism
- Blizzards
- Bomb threat
- Droughts
- Earthquakes
- Facility lockdown
- Floods
- Food contamination (intentional or unintentional)
- Food poisoning event
- Food recalls
- Food/supply delivery disruption
- Hurricanes
- Ice storms
- Interruption of telephone or internet services
- Kitchen fires
- Labor disputes
- Norovirus outbreak
- Refrigerator or freezer breakdowns
- Rolling black-outs
- Sewer backup
- Tornadoes
- Water or gas line break
- Wild fires

SAY: You have listed many disruptions and unforeseen situations that could compromise food safety and the ability to function. As you can see from the list, there are many disasters that can impact a SNP.

SHOW SLIDE: *Emergency Preparedness Plan*

ASK: Why is it important to have an emergency preparedness plan specific for the school nutrition operation?

DO: Allow participants to respond.

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

FEEDBACK:

- Foodservice employees are sometimes left out of the overall district's plan.
- We do not know when an emergency will occur.
- The foodservice director may not be available during a crisis.
- We may get calls from parents or the media.
- We want to serve safe food to children.

SAY: Now, you have identified many emergencies and good reasons to have a written emergency preparedness plan.

ASK: What are some concerns that might occur when school nutrition employees do not know what to do in an emergency situation?

FEEDBACK:

Potential problems may include:

- Safety of employees
- Unsafe food preparation conditions
- Irate and concerned parents
- Negative media attention
- Miscommunication among staff and school district personnel

SAY: Not knowing how to respond in an emergency may waste valuable time and add confusion to the situation. We have talked about emergencies that can happen and how important it is to be prepared. Now, let's define emergency preparedness. Everybody with an idea about this, please share it with us.

DO: Allow for brief discussion.

SHOW SLIDE: Emergency Preparedness Definition

SAY: Advance planning to cope with disruptions of the programs which could endanger the health and safety of customers, employees, and the community. Emergency management does not avert or eliminate the threats; instead, it focuses on creating plans to decrease the effect of disasters.

SHOW SLIDE: Steps in Responding to an Emergency

Instructor's Note: *There are some additional comments to read after each bullet point.*

SAY: Please turn to the Introduction of Emergency Preparedness section in the Participant's Workbook. You will see a numbered list. These are the steps in responding to an emergency. Let's read through these steps together.

DO: Read through the steps for Emergency Preparedness.

SAY: 1. Prevention/Mitigation – Activities that prevent or reduce the chance of an emergency or reduce the damage caused by unavoidable emergencies. In this phase, major vulnerability areas are assessed and decisions are made about how they should be addressed.

In this step, it is important to find a way to avert or lessen the effect of the emergency.

2. Preparedness – Emergency preparedness plans. In this phase, crisis plans in the district, school, and community are identified, and policies and procedures are developed to respond to emergencies and to protect the food supply from threats. This plan may be a part of a larger plan.
3. Response – Actions taken to save lives and prevent damage in an emergency situation. In this phase, the emergency preparedness plan policies and procedures are put into action to address the emergency situation. Here, it is important that all staff members in the process knows and understands their roles.
4. Recovery – Actions taken to return to normal operations. “lessons learned” are reviewed and incorporated into emergency preparedness plans for future use. It is important in this step to determine how the next disaster can better be handled.

SHOW SLIDE: Activity: What Is Emergency Preparedness? and Steps in Developing an Emergency Preparedness Plan

ACTIVITY: What Is Emergency Preparedness? and Steps in Developing an Emergency Preparedness Plan

Materials:

- **What Is Emergency Preparedness?** handout
- **Steps in Developing an Emergency Preparedness Plan** handout

Time: 10 minutes

Instructions: Review each handout **What Is Emergency Preparedness?** handout and **Steps in Developing an Emergency Preparedness Plan** handout.

SAY: As we have discussed, emergency preparedness is planning in advance how to cope with disruptions in the foodservice program to ensure the health and safety of the school nutrition customer, employees, and the community. 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. Look at the handout, **What Is Emergency Preparedness?** It provides information about emergency preparedness, activities you can complete when you return to your district, and references. It also summarizes much of our discussion today.

Now, find the handout, **Steps in Developing an Emergency Preparedness Plan**. This is an invaluable resource that can provide you specific guidance when you return to your district and begin to develop an emergency preparedness plan for your SNP.

The steps are as follows:

- Establish a school nutrition emergency preparedness team.
- Identify disruptions that may hinder the school nutrition operation and rate the priority of each item.
- Assign tasks and develop a schedule of target dates for each.
- Write the plan and track your progress.
- Determine a strategy for training staff on how to use the plan.
- Evaluate the effectiveness of the emergency preparedness plan and update as needed.

We need to remember that no two emergencies will be exactly alike. Therefore, it is important for us to know what type of emergencies can arise and what procedures are needed to minimize an already stressful situation. Having a written plan can provide the school nutrition staff a logical place to start when an emergency situation occurs. It is imperative that your Person In Charge (PIC) is familiar with it.

What Is Emergency Preparedness?

School nutrition operations can prepare for emergencies by developing a written plan to follow in the event of various emergencies. A successful emergency preparedness plan ensures the safe production, service, and storage of food. By developing an emergency preparedness plan, school nutrition employees can be prepared for potential service operation disruptions related to natural disasters, food recalls, and food defense.

Here Are the Facts

Many unforeseen situations can occur in a school nutrition operation that could compromise food safety and the ability to function in a typical fashion. Some possible disruptions are:

- Natural disasters, such as tornados, earthquakes, floods, blizzards, hurricanes, etc.
- Gas or electrical outages
- Water line break
- Food recall, which 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
- Intentional contamination of food. School nutrition employees now know that planning is needed to reduce the risk of food terrorism. Also, there needs to be a plan in place that specifies what to do in the event that food is intentionally contaminated

Application

Developing a written plan protects your school and community from harm in the event of a disaster. In addition, it helps you to take steps to prevent disaster by intentional contamination.

Steps in Developing an Emergency Preparedness Plan

A successful emergency preparedness plan ensures the safe production, service, and storage of food. By developing this plan, school nutrition employees can be prepared for potential service operation disruptions related to natural disasters, food recalls, and food defense.

- **Step 1:** Establish a school nutrition emergency preparedness team.
 - Develop a contact list and chain of command.
 - Define responsibilities for the school nutrition director and the emergency preparedness team.
- **Step 2:** Identify disruptions that may hinder the school nutrition operation and rate the priority of each item.
 - Identify current activities, policies, and procedures already in place.
 - Add items unique to your school.
 - Rate the priority of each item.
- **Step 3:** Assign tasks and develop a schedule of target dates for each.
 - The priority rating can be used to determine a schedule for implementing each task.
 - The schedule should specify the responsibilities assigned to each team member and the target deadline for addressing each measure.
- **Step 4:** Write the plan and track your progress.
 - Remember to follow district and school policies.
- **Step 5:** Determine a strategy for training staff on how to use the plan.
 - Schedule training for school nutrition staff. Consider scheduling one date to present the overall plan and several follow-up dates to cover different aspects of the plan, such as food defense, food recall, operating without power, operating as a shelter, etc.
 - Schedule ongoing emergency training focusing on specific aspects of the plan. USDA table top exercises can be used as a resource.
- **Step 6:** Evaluate the effectiveness of the emergency preparedness plan and update as needed.
 - Establish an on-going assessment of the plan (i.e., Is it meeting the needs of the school nutrition operation?).
 - After emergency situations, evaluate how the plan worked, and revise or update as needed.

SAY: Start preparing to develop an emergency preparedness plan by asking your staff to identify their roles in the development of the plan. Consider presenting one or more of the following scenarios on index cards to teams (3 to 5 people) of school nutrition staff in your district as an emergency preparedness practice activity.

- You lose electricity during the peak period of preparation and service.
- A school nutrition employee discovers there is a leak in the water main close to cleaning supplies.
- You receive a recall notice from the USDA of a certain poultry product. You had planned to serve this product on the next day's menu.
- Someone gets into the storeroom and sprinkles disinfectant in the flour container. Bread was made with the contaminated flour.
- The Chamber of Commerce has requested that you give a potential newcomer to the community a tour of the central kitchen. They would like you to show him the big equipment and refrigerator units.
- You are operating as a shelter following a tornado. Local community members want to help. The members prepare meals at home and bring dishes to the school.

SHOW SLIDE: Food Recalls

SAY: The USDA Foods hold and recall process is used when a food safety issue about a USDA purchased food is raised. ICN published a manual called *Responding to a Food Recall Procedures for Recalls of USDA Foods* which provides an overview of the recall process for USDA Foods with a focus on school meals programs.

The food recall process for school meals programs differs depending on whether the recall affects USDA Foods or commercially purchased foods. But most important is that the school foodservice director follows the directions on handling the recall. The school nutrition director makes certain that all employees follow procedures to ensure the safety of the food served to the students. There is a sample *Handling a Food Recall Template (Sample SOP)* handout in the Participant's Workbook which we are going to review.

Instructor's Note: Review the **Handling a Food Recall Template (Sample SOP)** handout in the *Participant's Workbook*.

Handling a Food Recall Template (Sample SOP)

PURPOSE: To prevent foodborne illness in the event of a product recall.

SCOPE: This procedure applies to school nutrition employees who prepare or serve food.

KEY WORDS: Food Recalls

INSTRUCTIONS:

1. Train school nutrition employees on using the procedures in this SOP.
2. Follow State or local health department requirements.
3. Review the food recall notice and specific instructions that have been identified in the notice.
4. Communicate the food recall notice to feeding sites.
5. Hold the recalled product using the following steps:
 - Physically segregate the product, including any open containers, leftover product, and food items in current production that contain the recalled product.
 - If an item is suspected to contain the recalled product, but label information is not available, follow the district's procedure for disposal.
6. Mark recalled product "Do Not Use" and "Do Not Discard." Inform the entire staff not to use the product.
7. Do not destroy any USDA Foods without official written notification from the State Distributing Agency, USDA Food Safety Inspection Services (FSIS), or State or local health department.
8. Inform the school district's public relations coordinator of the recalled product.
9. Identify and record whether any of the product was received in the district, locate the food recall product by feeding site, and verify that the food items bear the product identification code(s) and production date(s) listed in the recall notice.
10. Obtain accurate inventory counts of the recalled products from every feeding site, including the amount in inventory and amount used.
11. Account for all recalled product by verifying inventory counts against records of food received at the feeding site.

MONITORING:

School nutrition employees and the school nutrition manager will visually observe that school sites have segregated and secured all recalled products.

CORRECTIVE ACTION:

1. Retrain any school nutrition employee found not following the procedures in this SOP.
2. Determine if the recalled product is to be returned and to whom, or destroyed and by whom.
3. Notify feeding site staff of procedures, dates, and other specific directions to be followed for the collection or destruction of the recalled product.
4. Consolidate the recall product as quickly as possible, no later than 30 days after the recall notification.
5. Conform to the recall notice using the following steps:
 - a. Report the quantity and site where product is located to manufacturer, distributor, or State agency for collection. The quantity and location of the affected USDA Foods must be submitted to the State Distributing Agency within 10 calendar days of the recall.
 - b. Obtain the necessary documents from the State Distributing Agency for USDA Foods. Submit necessary documentation for reimbursement of food costs.
 - c. Complete and maintain all required documentation related to the recall including:
 - Recall notice
 - Records of how food product was returned or destroyed
 - Reimbursable costs
 - Public notice and media communications
 - Correspondence to and from the public health department and State agency

VERIFICATION AND RECORD KEEPING:

School nutrition employees will record the name of the contaminated food, date, time, and the reason why the food was discarded on the Damaged or Discarded Product Log. The school nutrition manager will verify that appropriate corrective actions are being taken by reviewing, initialing, and dating the Damaged or Discarded Product Log each day. Maintain the Damaged or Discarded Product Logs for a minimum of 1 year.

DATE IMPLEMENTED: _____ **BY:** _____

DATE REVIEWED: _____ **BY:** _____

DATE REVISED: _____ **BY:** _____

Adapted from: Institute of Child Nutrition. (2013). *Responding to a Food Recall*. University, MS: Author.

SHOW SLIDE: Food Biosecurity

SAY: As our world changes, so does the need for additional protection of our food supply. New threats such as terrorism have become a part of our society, and we must be prepared to counter these threats. Keeping our nation's food supply safe from terrorism requires a total team effort with participation from Federal, State, and local governments working together to establish guidance for bolstering the biosecurity of food throughout its journey from farm to table. Working together, we can achieve our biosecurity goals and continue to foster good nutrition and improved health for America's children and families.

ASK: Exactly what do we mean when we use the term "food biosecurity?"

DO: Allow several participants to respond.

FEEDBACK:

Definition of Food Biosecurity – the protection of food from bioterrorism, which is the intentional use of biological and chemical agents for the purpose of causing harm.

SAY: Although the Food and Nutrition Service (FNS) does not require or mandate that schools have a foodservice biosecurity management plan, given the reality of the threat that bioterrorism presents in our country, FNS strongly urges schools to take precautions against bioterrorism. It is the responsibility of the school nutrition director to identify and use appropriate resources and provide leadership for implementing and maintaining a current emergency preparedness plan. In this lesson we have identified many of the emergency situations which can affect the operations of the SNPs. Let's look at how you get started developing your emergency plans.

SHOW SLIDE: Emergency Preparedness Planning

SAY: Planning is essential to ensuring that SNPs can respond to emergencies in an efficient and effective manner. Effective planning prevents or reduces the chance of an emergency, reduces the damage caused, and assist in the return to normal operations.

SHOW SLIDE: Activity: Emergency Preparedness Planning Matrix**ACTIVITY: Emergency Preparedness Planning Matrix**

Materials: Emergency Planning Matrix handout

Time: 5 minutes

Instructions: Have participants review the **Emergency Planning Matrix** handout.

SAY: Please review the **Emergency Preparedness Planning Matrix** handout developed by ICN in the Participant's Workbook. This is a shortened version of the plan included in the Emergency Readiness Plan kit which is available on the ICN website. This version provides you with an idea of the comprehensiveness of the planning process. The Emergency Readiness Plan provides you with forms and sample plan formats for many types of emergencies. As you can see, there are many things to consider.

Instructor's Note: *Participants are only to review the handout as there is not enough time to complete the checklist during the class.*

Emergency Preparedness Planning Matrix

Category	Information Detail	Needed	Added
Contacts	School nutrition emergency preparedness team member contact information		
	Delegation of tasks among emergency preparedness team members		
	Chain of command to follow when responding to an emergency		
	School nutrition director		
	School nutrition employees		
	Substitute school nutrition employees		
	School principal		
	District superintendent		
	School district emergency contacts		
	Local public health contacts, such as sanitarians, fire, and rescue department representatives		
	State agency emergency contacts		
	Department of Homeland Security officer		
	Hazardous Materials (HAZMAT) representatives		
	Environmental health specialists/sanitarians		
	Federal food safety regulatory agency representatives (FDA or FSIS)		
	Local fire department		
	Local police department		
	Utilities		
	Community relief organizations		
	Media spokesperson		
	List of drivers, transporters, and vendors		
	Local food sources		
	Local beverage suppliers		
Local cleaning and chemical supplies			
Suppliers and alternate suppliers			
Message carriers			

Category	Information Detail	Needed	Added
Logistical Information	Location of pagers and radio communications		
	Location of keys to school nutrition operation		
	Driving directions to school for local police, fire department, and other first responders		
	Distribution of emergency contact list to appropriate school staff		
	Schedule of deliveries to school		
	Evacuation plan for school		
	Diagram showing entry points for emergency personnel		
Standard Operating Procedures	Choosing suppliers		
	Dealing with a water supply disruption		
	Handling a food defense crisis		
	Handling a food recall		
	Handling communication during emergencies		
	Handling electrical outages		
	Handling foods in malfunctioning freezers		
	Handling a gas utilities disruption		
	Handling mail		
	Handling suspected contamination of airflow		
	Meeting special needs in emergency situations		
	Monitoring school nutrition operation equipment		
	Monitoring school nutrition operation/food preparation areas		
	Monitoring school nutrition operation personnel		
	Monitoring general security		
	Monitoring the exterior of the school building		
	Monitoring the water and ice supply		
	Responding to changes in the national security threat level		
	Operating as a shelter		
	Receiving deliveries		
Securing storage areas			
Serving meals to adults during the time of emergency			
Serving meals to students at alternate site(s)			

Category	Information Detail	Needed	Added
Standard Operating Procedures, continued	Storing food (inventory preparedness)		
	Storing and using poisonous or toxic chemicals		
	Tracking ingredients from manufacturer to school		
	Using foods from an unapproved outside source		
	Storing food (inventory preparedness)		
	Storing and using poisonous or toxic chemicals		
	Tracking ingredients from manufacturer to school		
	Using foods from an unapproved outside source		
Policies	Policy to identify the chain of command to follow when responding to an emergency		
	Policy to verify and update emergency contact information on a regular basis		
	Policy to notify appropriate law enforcement and public health officials when school receives a threat of a possible intentional contamination of the food supply		
	Policy to notify appropriate law enforcement and public health officials when school observes product tampering		
	Policy to investigate at time of delivery any shipping documents with suspicious changes		
	Policy on suspending the use of contaminated water		
	Policy for meeting special needs in emergency situations		
	Policy to identify who should speak to the media		
	Policy on accepting and using foods from an unapproved outside source		
	Policies related to operating as a shelter		
Menus/ Inventory	Emergency food inventory		
	Three-day shelter menu		
	Emergency feeding breakfast menus		
	Emergency feeding lunch menus		
Donations/ Volunteers	Donations		
	Volunteer log		
	Volunteers		
	Certificate of appreciation		
	Sample thank-you letter to an organization		
	Sample thank-you letter to a volunteer		

Source: Institute of Child Nutrition. (2008). *Emergency preparedness participant's workbook*. University, MS: Author.

SAY: After looking at the **Emergency Preparedness Planning Matrix** handout, we can see why networking with school officials, local agencies, and vendors is so important. Keep the **Emergency Preparedness Planning Matrix** and complete it when you return to your district. You can use these formats for developing your emergency preparedness plans for all types of emergencies and disasters.

The ICN has additional resources which may be helpful in training staff and developing your Emergency Preparedness Plans. There are lessons on emergency preparedness, food recalls, and water emergencies. Guidance on developing plans to prevent or respond to bioterrorism is also included.

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

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.

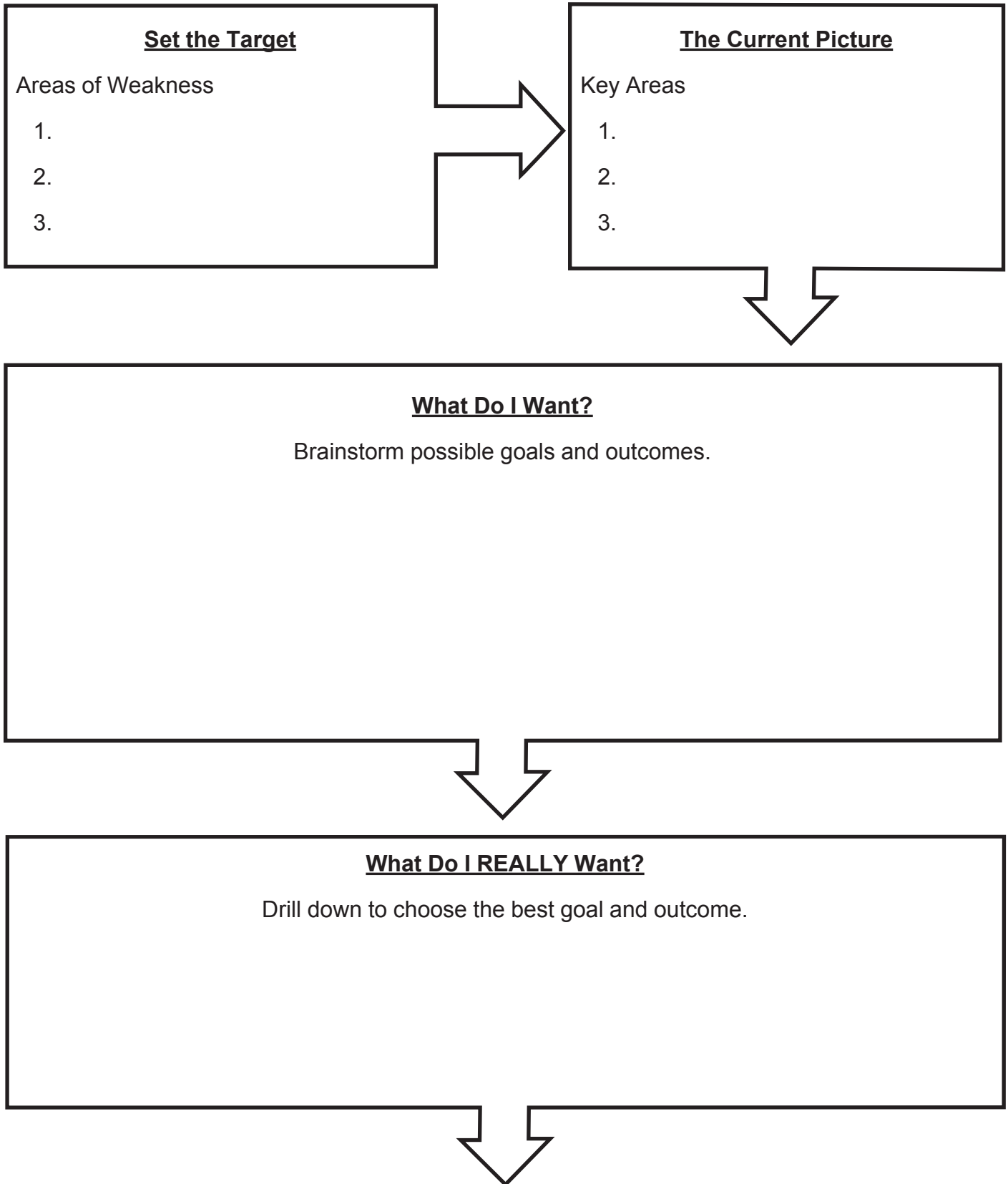
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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 Emergency Preparedness. 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 Emergency Preparedness** worksheet.

SMART Goals for Emergency Preparedness



SMART Goal for Emergency Preparedness, 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>	

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

2022

01/24/2022

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.

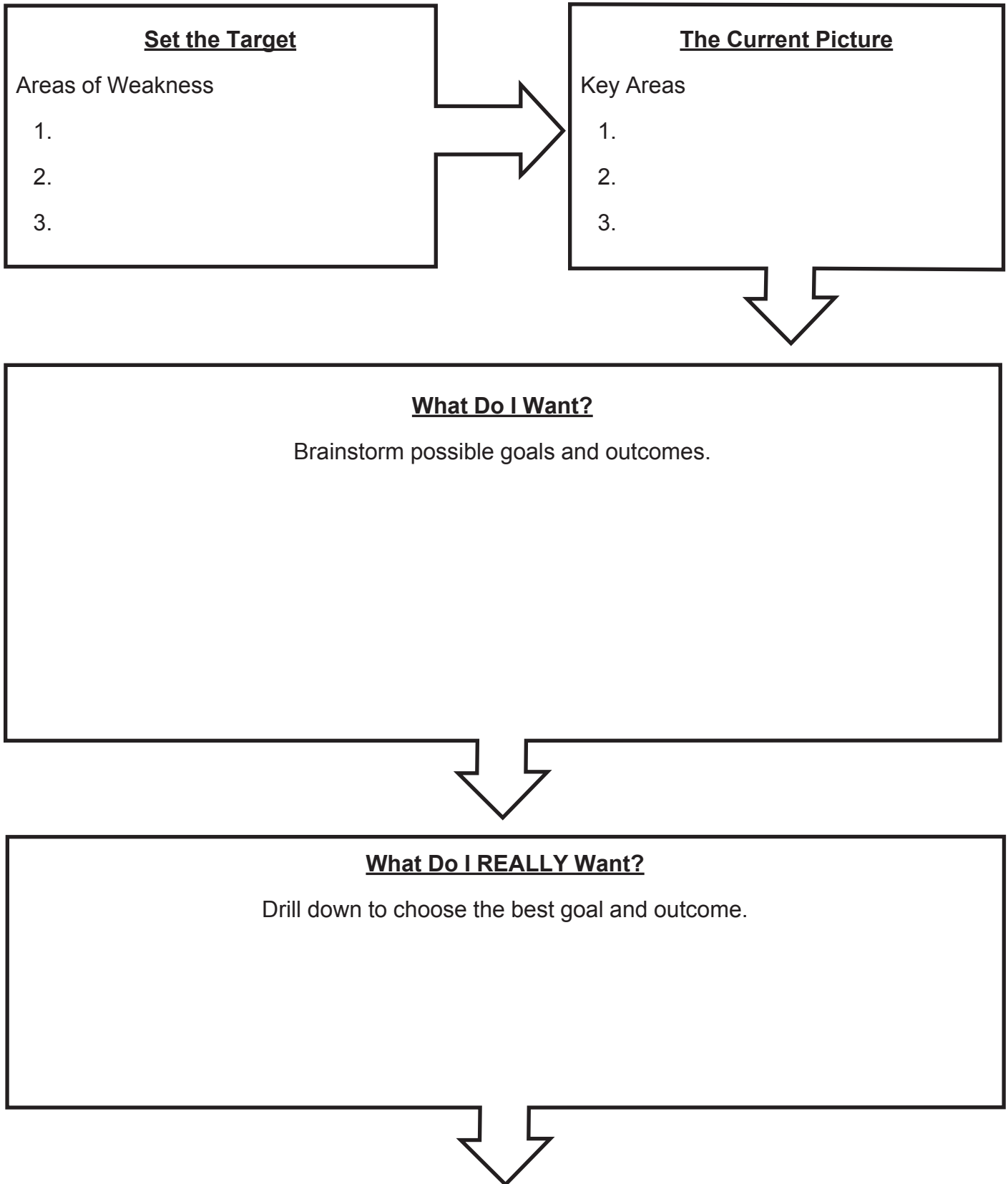
R (relevant) – The goal needs to reference how it relates to our priorities and needs so we can make certain it is based on the forecasted needs of our program.

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



SMART Goals for Your SNP, continued

Make sure it meets each characteristic.

<p><u>SPECIFIC</u> How will I do it? <ul style="list-style-type: none"> • Who? • What? • When? • Where? • How? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p><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? </p>	
<p>MY SMART GOAL IS:</p> 	

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



2022

01/24/2022

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 food 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.

Food Component—Breakfast – A food component is one of the three food groups that comprise a reimbursable breakfast. The three food 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 food 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.

Food Component—Lunch – Food 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 food components. For the purposes of OVS, a school must offer at least four food items from the three required food 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 food components. For example, a hamburger patty on a bun is one food item with two of the five food 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 food 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 food 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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