

# **Succession Planning for Management-Level Staff in School Nutrition Programs**



National Food Service Management Institute  
The University of Mississippi  
1-800-321-3054

**2013**

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

The information provided in this publication is the result of independent research produced by NFSMI and is not necessarily in accordance with U.S. Department of Agriculture Food and Nutrition Service (FNS) policy. FNS is the federal agency responsible for all federal domestic child nutrition programs including the National School Lunch Program, the Child and Adult Care Food Program, and the Summer Food Service Program. Individuals are encouraged to contact their local child nutrition program sponsor and/or their Child Nutrition State Agency should there appear to be a conflict with the information contained herein, and any state or federal policy that governs the associated Child Nutrition Program. For more information on the federal Child Nutrition Programs please visit [www.fns.usda.gov/cnd](http://www.fns.usda.gov/cnd).

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

© 2013, National Food Service Management Institute, The University of Mississippi

Except as provided below, you may freely use the text and information contained in this document for non-profit or educational use providing the following credit is included:

Suggested Reference Citation:

Rushing, K. (2013). *Succession Planning for Management-Level Staff in School Nutrition Programs*. University, MS: National Food Service Management Institute.

The photographs and images in this document may be owned by third parties and used by The University of Mississippi or The University of Southern Mississippi under a licensing agreement. The universities cannot, therefore, grant permission to use these images. For more information, please contact [nfsmi@olemiss.edu](mailto:nfsmi@olemiss.edu).

**National Food Service Management Institute  
The University of Mississippi**

**Building the Future Through Child Nutrition**

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

**PURPOSE**

The purpose of the National Food Service Management Institute is to improve the operation of child nutrition programs through research, education and training, and information dissemination.

**MISSION**

The mission of the National Food Service Management Institute is to provide information and services that promote the continuous improvement of child nutrition programs.

**VISION**

The vision of the National Food Service Management Institute is to be the leader in providing education, research, and resources to promote excellence in child nutrition programs.

**CONTACT INFORMATION**

**Headquarters**

**Administrative Division**

The University of Mississippi

Phone: 800-321-3054

Fax: 800-321-3061

[www.nfsmi.org](http://www.nfsmi.org)

**Education and Training Division**

**Information Services Division**

The University of Mississippi

6 Jeanette Phillips Drive

P.O. Drawer 188

University, MS 38677-0188

**Applied Research Division**

The University of Southern Mississippi

118 College Drive #5060

Hattiesburg, MS 39406-0001

Phone: 601-261-2480

Fax: 888-262-9631



## **Acknowledgments**

**WRITTEN AND DEVELOPED BY**

**Keith Rushing, PhD, RD  
Research Scientist**

**Applied Research Division  
The University of Southern Mississippi**

**NFSMI EXECUTIVE DIRECTOR  
Katie Wilson, PhD, SNS**

---

---

## TABLE OF CONTENTS

---

---

EXECUTIVE SUMMARY .....	8
INTRODUCTION .....	11
Research Objectives	
METHOD .....	14
Research Plan	
Informed Consent	
Data Analysis	
RESULTS AND DISCUSSION .....	21
School Nutrition Profession Expert Panel	
Importance of Succession Planning	
Current State of Succession Planning	
Promotion of the Field of School Nutrition Management to K-12 Students	
Succession Planning and College Students	
Developing School Nutrition Directors Internally	
Attracting School Nutrition Directors Externally	
General Advantages of Succession Planning	
General Barriers to Succession Planning	
Resources Needed	
Research Needed	
School District Expert Panel	
The Importance of Succession Planning	
Current State of Succession Planning	
Characteristics and Qualifications of an Effective School Nutrition Director	
Professional Group Involvement in Succession Planning	
Promotion of the Field of School Nutrition Management to K-12 Students	
Succession Planning and College Students	
Developing School Nutrition Directors Internally	
Attracting School Nutrition Directors Externally	
General Advantages of Succession Planning	
General Barriers to Succession Planning	
Resources Needed	
CONCLUSIONS AND RECOMMENDATIONS .....	34
REFERENCES .....	42

---

---

**LIST OF TABLES**

---

---

Table 1: School Nutrition Profession Expert Panel Discussion Topics .....15

Table 2: Local School District Expert Panel Discussion Topics .....17

**SUCCESSION PLANNING FOR MANAGEMENT-LEVEL STAFF IN  
SCHOOL NUTRITION PROGRAMS**

---

---

**EXECUTIVE SUMMARY**

According to research studies, most school nutrition (SN) directors have been in their current positions for greater than 15 years, and almost one third are expecting to retire by the year 2014 (Rushing, Nettles, and Johnson, 2009; Nettles, Carr, Johnson and Federico, 2006). As these retirements take place, SN programs will lose valuable skills and knowledge unless a strategy is in place to pass on these assets. One such strategy is succession planning. Atwood (2007) defined succession planning as a continuous process of identifying future organizational leaders and developing them so that they are ready to be promoted to leadership roles.

Succession planning for SN directors can be addressed from two levels, which are the school district and the SN professional level. The district level would apply to an individual SN program and SN director, while the professional level would involve developing strategies to meet the needs of SN programs throughout the United States. In 2009, the National Food Service Management Institute's (NFSMI) National Advisory Council emphasized the importance and urgency of succession planning for SN directors and the SN profession. Therefore, the purpose of this study was to identify issues associated with succession planning in order to provide the foundation for future research and for the development of resources for SN programs, along with providing information for the NFSMI Education and Training Division to utilize for training purposes.

This project consisted of two expert panel discussions. The first panel focused on succession issues for the profession of SN management, while the second panel focused on



succession planning at the school district level. For the first panel, multiple professionals were invited from different areas related to SN management, including: the School Nutrition Association (SNA) and School Nutrition Services Dietetics Practice Group leadership; university professionals in the fields of dietetics, nutrition, and hospitality management; child nutrition state agency representatives, and SN directors with a demonstrated record of success and leadership in the operation of child nutrition programs. From this pool, seven individuals agreed to participate, with at least one representative from each of the specific areas previously identified. For the second panel, a diverse mix of SN directors was identified from around the United States. This group included SN directors from school districts with large and small student enrollment, urban and rural localities, and high and low percentages of students approved for free and reduced-price meals. From this group, eight directors representing a broad distribution of these characteristics were invited, and they agreed to participate.

Expert panel results revealed the following major themes:

1. Importance of succession planning;
2. Current state of succession planning;
3. Characteristics and qualifications needed to be an effective SN director;
4. Promotion of the field of SN management to K-12 students;
5. Succession planning and college students;
6. Developing SN directors internally;
7. Attracting SN directors externally;
8. General advantages of succession planning;
9. General barriers to succession planning;
10. Resources needed; and
11. Research needed.

Theme number three, “characteristics and qualifications needed to be an effective SN director,” was not found in the SN profession expert panel discussion. Theme number 11, “research needed,” was not found in the school district panel discussion.

Results suggest that school district officials making the hiring decisions are not aware of the importance of succession planning for SN directors and of the necessary qualifications required for these positions. Much can be gained by engaging in local and national succession planning, such as increasing the availability and retention of qualified talent and promoting sustainable quality in SN programs. To achieve these gains, several challenges must be overcome:

- Changing public perception of the profession of SN management;
- Gaining administrative support and commitment for SN director succession planning;
- Growing the number of individuals interested in the field of SN management;
- Increasing avenues for developing SN talent;
- Coordinating the activities related to succession planning among SN professional organizations; and
- Working with limited financial resources to accomplish these objectives.

The areas that should be considered when looking for a solution are as follows:

- Marketing to promote interest in the profession;
- Internships and practicums to provide experience;
- Internal development of SN employees;
- Mentoring opportunities for new SN directors;
- Resources to support local school districts in succession planning; and
- Research to support succession planning.

## INTRODUCTION

According to research studies, most school nutrition (SN) directors have been in their current positions for greater than 15 years, and almost one third are expecting to retire by the year 2014 (Rushing, Nettles, and Johnson, 2009; Nettles, Carr, Johnson and Federico, 2006). As these retirements take place, SN programs will lose valuable skills and knowledge unless a strategy is in place to pass on these assets. One such strategy is succession planning.

Atwood (2007) defined succession planning as a continuous process of identifying future organizational leaders and mentoring them so they are ready to be promoted to leadership roles (Atwood, 2007). Rothwell (2010) stated that succession planning includes the following steps:

- Establish succession planning goals and communicating those goals to all stakeholders;
- Assess current and future requirements of the position;
- Appraise current performance and future potential candidates;
- Create plans to enhance the development of the talent pool; and
- Program evaluation.

Succession planning for SN directors can be addressed from two levels, which are the school district and the SN profession level. The district level would apply to an individual SN program and SN director, while the profession level would involve developing strategies to meet the needs of SN programs throughout the United States.

In 2009, the National Food Service Management Institute's (NFSMI) National Advisory Council (NAC) emphasized the importance of succession planning for SN directors and identified the following succession planning needs:

- Education and Training
  - Reduce barriers to training;
  - Increase availability of adult-appropriate learning;
  - Evaluate tuition assistance; and
  - Create opportunities for current workforce to increase knowledge/skills for advancement.
- Strategic Planning
  - Establish long range planning/vision;
  - Market child nutrition as a profession more effectively; and
  - Impact of professional standards.
- Opportunities in Child Nutrition Programs
  - Grow internal talent; and
  - Identify opportunities to move talent across child nutrition programs.
- Mentoring Child Nutrition Programs Needed
  - Create networking opportunities where jobs/careers are located - involve education institutions;
  - Increase recruiting effort into profession; and
  - Develop SN internships and increase involvement in dietetic internships.
- Educate Universities About Opportunities in School Nutrition
- Meeting Generational Expectations

Because of the impending demand as SN directors retire and the importance of succession planning as emphasized by NFSMI NAC, this study was initiated. The purpose of this study was to identify issues associated with succession planning in order to provide the foundation for future research and development of resources for SN programs, along with providing information for the NFSMI Education and Training Division to utilize for training purposes.

### **Research Objectives**

The specific objectives of this project were to identify the following:

- Current practices and successful programs for succession planning;
- Advantages to developing and sustaining succession planning;
- Barriers to developing and sustaining succession planning; and
- Training programs and resources needed to assist in succession planning.

## **METHOD**

### **Research Plan**

This project consisted of two expert panel discussions. The first panel focused on succession issues for the profession of school nutrition (SN) management, while the second panel focused on succession planning at the district level. For the first panel, multiple professionals were invited from different areas related to SN management, including: the School Nutrition Association (SNA) and School Nutrition Services Dietetics Practice Group leadership; university professionals in the fields of dietetics, nutrition, and hospitality management; child nutrition state agency representatives, and SN directors with a demonstrated record of success and leadership in the operation of child nutrition programs. From this pool, seven individuals agreed to participate, with at least one representative from each of the specific areas previously identified. For the second panel, a diverse mix of SN directors was identified from around the United States. This group included SN directors from school districts with large and small student enrollment, urban and rural localities, and high and low percentages of students approved for free and reduced-price meals. From this group, eight directors representing a broad distribution of these characteristics were invited and agreed to participate.

Participant invitations included an explanation of the study, the specific objectives of the expert panel session, and contact information for questions and concerns. Confirmation letters included information regarding the upcoming panel discussion and travel arrangements.

Prior to conducting the expert panel sessions, researchers at the National Food Service Management Institute, Applied Research Division (NFSMI, ARD) developed discussion topics for each expert panel session based on research objectives and previous research. A listing of those discussion topics is provided in Tables 1 and 2 below.

Table 1

*School Nutrition Profession Expert Panel Discussion Topics*

---

**Current Practices and Successful Programs**

1. How would you characterize the need for succession planning for the profession of SN management?
2. Currently, are there any professional groups actively involved in succession planning for this profession? If so, who are these groups and what types of succession planning activities do they conduct? What steps have been taken by the SN industry to entice individuals to choose a career in SN management?
3. Are there specific types of succession planning activities that should take place to prepare SN managers to become SN directors?
4. What would you identify as the top five talent pools from which you expect the SN industry to attract SN directors in the next five to ten years?
5. How is the SN industry promoting the field of SN management to students in primary and secondary education? What would those activities entail?
6. What would be the best way for the SN industry to promote the field of SN management to primary and secondary education students?
7. What steps have been taken by the SN industry to attract students into post secondary education programs with the goal of preparing them to become future SN leaders? What steps should be taken (i.e., more scholarships, tuition waivers, legislation)?
  - a. What are other ways for the SN industry to promote the field of SN management to community college students?
  - b. What are other ways for the SN industry to promote the field of SN management to university students?
8. What post-secondary education fields of study would you identify as having the most potential for attracting and developing successful future SN directors?
9. What steps have been taken by the SN profession to attract and develop SN directors within the SN workforce? What steps should be taken?
10. What steps have been taken by the SN industry to attract and develop SN directors from the SN managerial pool? What steps should be taken?
11. What steps have been taken by the SN industry to attract SN directors from other industries (i.e., business, accounting, food service sales industry)? What steps should be taken?
12. What are other ways for the SN profession to promote the field of SN management to foodservice management industry professionals?

---

(Table 1 continues)

*(Table 1 continued)*

*School Nutrition Profession Expert Panel Discussion Topics*

---

**Advantages to Developing and Sustaining Succession Planning**

13. What would you identify as the primary advantages for developing a succession plan for:
  - a. School nutrition managers?
  - b. School nutrition directors?
14. What are the advantages of choosing a career in SN management compared to:
  - a. Careers in hospitality management?
  - b. Careers in healthcare nutrition management?

**Barriers to Developing and Sustaining Succession Planning**

15. What are the primary barriers to succession planning for the profession of SN management?
16. What are the barriers to promoting the field of SN management to:
  - a. Primary and secondary school students?
  - b. Community college students?
  - c. University students?
  - d. Business graduates?
  - e. Hospitality graduates?
  - f. Nutrition graduates?
  - g. Dietitians?
  - h. Restaurant managers?
  - i. Hospital foodservice directors?
17. What are the best ways to reduce these barriers?

**Training Programs, Resources, and Research Needed**

18. What resources are needed to support the SN industry in succession planning?
  19. What research is needed to support the SN industry in succession planning?
-



Table 2

*Local School District Expert Panel Discussion Topics*

---

**Current Practices and Successful Programs for Succession Planning**

1. How important is the need for succession planning activities for the position of SN director in your school district?
2. Do you or anyone in your school district engage in succession planning activities for the position of SN director?
3. What steps are involved when you or your school district seek managerial personnel for the SN program?
  - a. Who is involved in the administration and implementation of this process?
  - b. Is the process formal or informal?
    - i. Are there written policies and procedures?
    - ii. If you answered yes, who developed these?
  - c. Are there procedures in place to evaluate the effectiveness of the process and to make continuous improvements?
4. What do you see as the most important personal and professional characteristics of your successor?
  - a. Education?
  - b. Experience?
  - c. Certifications/credentials?
  - d. Leadership skills?
  - e. Managerial skills?
  - f. Administrative skills?
  - g. Financial skills?
  - h. Marketing skills?
  - i. Human resource skills?
  - j. Culinary skills?
  - k. Leadership skills?
  - l. Skills in dealing with conflicts?
  - m. Other?
5. What are the sources of your external talent pool?
  - a. Universities?
  - b. Community colleges?
  - c. Institutional foodservice?
  - d. Restaurant industry?
  - e. School administration?
  - f. Teachers within your school district?
6. What type of marketing and promotional activities do you or your school engage in to draw candidates from your external talent pool?

---

*(Table 2 continues)*

(Table 2 continued)

*Local School District Expert Panel Discussion Topics*

---

**Current Practices and Successful Programs for Succession Planning**

7. How do you and your school district promote the field of SN management to students in primary and secondary school?
  - a. What would be the best way to promote the field of SN management to primary and secondary school students?
8. What steps have you or your school district taken to attract students into post-secondary education programs with the goal of preparing them to become future SN leaders?
  - a. What steps should be taken (i.e., more scholarships, tuition waivers, legislation)?
  - b. What are other ways to promote the field of SN management to community college students?
  - c. What are other ways to promote the field of SN management to university students?
9. What post secondary education fields of study would you identify as having the most potential for attracting and developing successful future SN directors?
  - a. Nutrition?
  - b. Dietetics?
  - c. Hospitality management?
  - d. Business?
  - e. Other?
10. What steps have you or your school district taken to attract SN directors from other industries (i.e., business, accounting, food service, or sales industry)? What steps should be taken?
11. What are other ways you or your school district can promote the field of SN management to foodservice management industry professionals in your area?
12. What steps have you or your school district taken to identify and develop SN leaders from within the SN staff in your school district?
  - a. How is the progress of these activities monitored?
  - b. What steps should be taken to identify and develop SN leaders from within the SN staff in your school district?
  - c. Do your SN employees know when they are an internal candidate for a position?
13. What steps have you or your school district taken to identify and develop SN directors from the SN managerial pool in your school district?
  - a. How is the progress of these activities monitored?
  - b. What steps should be taken to identify and develop SN leaders from the SN managerial pool in your school district?
  - c. Do your SN managers know when they are an internal candidate for a position?

---

(Table 2 continues)

(Table 2 continued)

*Local School District Expert Panel Discussion Topics*

---

**Advantages to Developing and Sustaining Succession Planning**

14. What would you identify as the advantages of succession planning at the school district level for:
  - a. School nutrition managers?
  - b. School nutrition directors?
15. What are the advantages of choosing a career in SN management compared to other careers in foodservice management?
  - a. Compared to careers in hospitality management?
  - b. Compared to careers in healthcare nutrition management?

**Barriers to Developing and Sustaining Succession Planning**

16. What would you identify as the barriers to succession planning for SN directors at the school district level?
17. What are the barriers to promoting the field of SN management to:
  - a. Primary and secondary school students?
  - b. Community college students?
  - c. University students?
  - d. Business graduates?
  - e. Hospitality graduates?
  - f. Nutrition graduates?
  - g. Dietitians?
  - h. Restaurant managers?
  - i. Hospital foodservice directors?
18. What are the best ways to reduce these barriers?

**Training Programs and Resources Needed to Assist in Succession Planning**

19. What training programs and resources would you like to see developed to support succession planning for SN directors at your school district?
  20. What research is needed to support your school districts in succession planning for SN directors?
-

Each expert panel session was conducted by NFSMI, ARD researchers on the campus of The University of Southern Mississippi in Hattiesburg, Mississippi. At the beginning of each session, panel members were advised that their participation in the study was voluntary, that they could choose to stop contributing at any time, and that all responses and discussions were completely anonymous and could not be tied back to any expert panel member. The agendas established for each expert panel were designed to address the issues outlined in the research objectives. Throughout each session, participants were asked semi-structured, open ended questions related to the research objectives. A structured approach was employed to keep the discussions focused on the selected topics. The expert panels were moderated by one researcher, while an additional researcher captured participant comments on a computer. Toward the end of each session, after all questions were discussed, the moderator summarized responses, and participants were asked to verify the accuracy of the depiction of the discussion summation.

### **Informed Consent**

The Institutional Review Board at The University of Southern Mississippi reviewed and approved the protocol for this study.

### **Data Analysis**

Data analysis consisted of a thorough review of the transcripts of the each expert panel and the identification of themes and important points within each discussion.

## **RESULTS AND DISCUSSION**

Upon review of the discussion topics introduced to each expert panel and the transcripts of each panel discussion, eleven major themes emerged:

1. Importance of succession planning;
2. Current state of succession planning;
3. Characteristics and qualifications needed to be an effective school nutrition (SN) director;
4. Promotion of the field of SN management to K-12 students;
5. Succession planning and college students;
6. Developing SN directors internally;
7. Attracting SN directors externally;
8. General advantages of succession planning;
9. General barriers to succession planning;
10. Resources needed; and
11. Research needed.

Theme number three, “characteristics and qualifications needed to be an effective SN director,” was not found in the SN profession expert panel discussion. Theme number 11, “research needed,” was not found in the school district panel discussion.

### **School Nutrition Profession Expert Panel**

#### ***Importance of Succession Planning***

Only minimal discussion transpired related to the importance of succession planning. One expert panelist indicated succession planning was critical, “due to increases of retirees.” The

majority of the time was spent discussing the current state of succession planning and promotion of the field of SN management to students, SN employees, and potential external applicants.

### ***Current State of Succession Planning***

It appears that succession planning for the field of SN management is in the developmental stage. One panelist reported that, “No succession planning is being done at the local level.” Another panelist, who conducted research on this topic, reported, “Twenty-two percent of school districts are utilizing some aspect of succession planning for SN directors.” Several panelists described two university-based SN internship programs that are being piloted by the School Nutrition Association (SNA). These programs are “tied to the SNS (School Nutrition Specialist) credentialing exam” and the “host districts are approved sites for 5 years.” Dallas Independent School District, in cooperation with Texas Woman’s University in Texas and Framingham State University in Massachusetts, are the two pilot sites; both require a master’s degree to attend. Panelists emphasized that if the SNA is going to be successful in expanding these internships to other universities, strong marketing activities will be required. Additionally, it was noted that the state agency in Florida has created a non-dietetics SN internship program, and the state agency in California is trying to put together SN management-related degree programs with colleges and universities around the state. Another panelist explained that the California chapter of SNA is actively seeking mentoring opportunities for new SN directors.

### ***Promotion of the Field of School Nutrition Management to K-12 Students***

Panelists’ comments suggest that the field of SN management has received some promotion to primary and secondary school children; nonetheless, it seems there is much opportunity for improvement in this area. One panelist reported, “Farm to school is creating excitement and interest in school nutrition from students and other stakeholders.” Another

panelist commented that schools, “don’t take advantage of cafeterias and use them as learning laboratories.” Panelist suggestions for promoting the field of SN management to students included:

- “Nutrition education lessons in the classroom;”
- “Class visits to the cafeteria ‘to see how everything works;” and
- “Teaching students culinary techniques in the kitchen.”

### *Succession Planning and College Students*

Panelists discussed succession planning as it relates to college students. Many themes emerged, including knowledge, skills, fields of study, the profession of dietetics, internships, and credentials. Listed below are some comments from the panelists.

- “There is a need for specific knowledge and skills in colleges to prepare graduates.”
- “Nutrition education is important.”
- “School nutrition degree programs are uncommon.”
- “Fields of study with the most potential for SN management are hospitality management, business management, communications/journalism, nutrition/dietetics, agriculture, education, and family and consumer sciences education.”
- “Dietitians are not in great demand for SN director positions.”
- “More emphasis is needed on school nutrition in dietetics and hospitality management programs.”
- “Dietetic students do not know all the career avenues available to them.”
- “We need more internship programs for students who are passionate about school nutrition.”

- “Students need internships that provide foodservice industry experience, similar to that provided by the National Association of College & University Food Services.”
- “There is an increased need for credentialed SN directors, but most educators are not aware of the SNS credential and what is required to obtain it.”

### *Developing School Nutrition Directors Internally*

Discussions regarding the development of SN directors from internal sources included identification of talent pool sources and recommendations for SNA, state agencies, and the NFSMI to help cultivate this talent. The sources of the internal talent pool that were identified were SN supervisors, SN managers, and assistant SN directors. Recommendations for cultivating this talent are expressed in the statements below:

- “The SNA should establish professional standards for SN directors based on school district size, since one size does not fit all.”
- “The SNA needs to define what mentoring looks like, such as the criteria for being a mentor and the essential steps involved in mentoring.”
- “State agencies or local SNA chapters need to track SN directors willing to be mentors and put them in contact with new directors who want to be mentored.”

It was also noted that state agencies, NFSMI and/or SNA need to:

- “Pool resources;”
- “Develop credentialing requirements that are the same in every state;”
- “Develop a guide to help potential applicants determine what job opportunities are available;” and
- “Create a template to help SN directors develop structured internship programs.”



### ***Attracting School Nutrition Directors Externally***

Panelists defined the external talent pool for SN directors as “people with operational foodservice management experience,” and “individuals from organizational cultures similar to schools, such as hospitals, colleges, contract companies, and the military.” When asked what steps we have taken to attract external talent, two examples given were “the creation of the dietetic practice group” and “the Let’s Move campaign.” It was noted that the Let’s Move campaign has increased interest from some culinary chefs, but that most culinary chefs are untrained in the field of school nutrition and have unrealistic expectations. It was further noted that as an industry, we need to develop a professional marketing campaign with a clear and concise message that targets the appropriate audiences.

### ***General Advantages of Succession Planning***

Several comments were given regarding the advantages of succession planning. Some panelists commented that succession planning would, “help capture the most talented of the pool before they go somewhere else.” Others believed succession planning would, “give school administrators faith in the SN program,” and “give people within the district the confidence to apply for the director position.” It was also believed that succession planning would, “increase the competency of SN directors,” and “create a career ladder for SN staff.”

### ***General Barriers to Succession Planning***

Multiple barriers to the succession planning process were noted. One panelist stated, “Three different entities are working separately on succession planning; The SNA, state agencies, and the NFSMI. This complicates the issue.” Another panelist commented that, “School nutrition directors do not know what succession planning resources are available or where to find them.”

Other barriers that were identified included:

- “Variation in district size and geographical location;”
- “Limited resources in small districts or rural areas;”
- “Differences in salary depending on location;”
- “Increased federal and state regulations;”
- “Availability of qualified people;”
- “Public perception that the field of school nutrition is not exciting or glamorous;”
- “Lack of respect for school nutrition as a career path;” and
- “Inaccurate perceptions by school administration of what the job of SN director entails.”

### ***Resources Needed***

Panelists suggested the development of several resources to help facilitate succession planning. One suggestion was for, “a Web site and brochures to promote the field of SN management.” Another suggestion was, “a set of SN management courses for non-dietetics students majoring in nutrition and hospitality management.” Lastly, it was suggested that “a template for implementing an internship program or practicum for SN management that is separate from a dietetics internship” would be helpful.

### **Research Needed**

Several ideas were offered for future research regarding succession planning. The target groups included in those research ideas were state agencies, dietetic and hospitality students, dietetic educators, and school administrators. Those suggestions are expressed in the statements below:

- “Conduct a review of what is being done by each state agency with regard to succession planning;”
- “Find out what dietetic students do when they are not accepted into internships.”
- “Conduct a survey of dietetic educators to see how much they prepare students related to *Keys to Excellence and Competencies, Knowledge, and Skills for District-Level SN Professionals.*”
- “Find out what school administrators are looking for in an SN director.”
- “Determine what criteria school administration is using to select SN directors.”
- “Identify the perceptions of school administration with regard to the profession of SN management and the skills of SN directors.”
- “Conduct focus groups with hospitality students to determine what they know about SN programs, their exposure to SN, and their perceptions about SN management.”

### **School District Expert Panel**

#### ***The Importance of Succession Planning***

When discussing the importance of succession planning, participants in the second expert panel commented on school administrators’ perspective and infiltration of contract management companies into the SN industry. Comments included the below statements:

- “Succession planning is very important for us, but I don’t think school administrators are aware of this or of the necessary qualification for the position.”
- “Succession planning is not on the radar of school administrators.”
- “As veteran SN directors retire, many school districts have opted to contract with foodservice companies.”

- “Contract companies are for profit, and their motivation is not always in best interest of kids.”
- “With contract management companies, state employees may lose benefits.”
- “Independent buying groups may lose their buying power.”

### *Current State of Succession Planning*

Panelists’ comments imply that succession planning is occurring informally. Some panelists believed that, “Most school districts are calling other SN directors to assist with interviews and the hiring process.” Other panelists noted, “Succession planning for some is moving up from a small school district into a larger school district.” Panelists also believed that, “School districts often work together to announce positions and help fill them.”

### *Characteristics and Qualifications of an Effective School Nutrition Director*

Expert panel members made several comments regarding the desired qualifications and characteristics of an SN director. The broad topic areas included in these comments were skills, experience, education, and credentials. The comments provided are listed below:

- “You need several skills, such as the ability to build relationships, make decisions, flexibility, and communication.”
- “Leadership skills are important.”
- “Different competencies and levels of communication skills may be needed based on the size of the school district, but the skill set is the same.”
- “In a small district, you need to know how to manage people and also know how to cook.”
- “Experience and skills are the key to success.”
- “Some experience is needed to gain the trust of administrators.”

- “Experience in foodservice management is critical.”
- “A degree does not mean someone has the necessary skills.”
- “Some states have requirements for education and certification.”
- “Smaller school districts may be more lenient with qualifications compared to larger districts.”
- “Compassion is an important characteristic for SN directors.”

### ***Professional Group Involvement in Succession Planning***

Panelist comments indicated some involvement by professional organizations concerning succession planning. However, these comments also demonstrated that there is room for improvement. The comments included the following: “The SNA has undertaken the development of a taskforce to investigate the issue;” “Professional organizations need to expand marketing efforts;” and “State agencies have not been proactive in identifying succession planning as an issue.”

### ***Promotion of the Field of School Nutrition Management to K-12 Students***

Only minimal discussion transpired relating to the promotion of the field of SN management to K-12 students. The comments that were provided identified avenues for promotion. Those avenues included “community involvement,” “career fairs,” and “high school culinary programs.”

### ***Succession Planning and College Students***

The major themes that emerged when panelists discussed succession planning and college students were lack of skills, preparation, and exposure related to the field of school nutrition. Statements reflecting these themes are listed below:

- “New college graduates do not have the necessary skills today, and will have to obtain some experience, or face serious difficulties.”
- “Dietetic interns hear very little about the profession of SN management.”
- “Dietetic interns need opportunities for shadowing SN directors, a child nutrition course, and more exposure to the field of SN management.”
- “Colleges do not present school nutrition as a professional career.”
- “School nutrition directors need to be available to speak to college students.”
- “School nutrition directors need to contact universities to market school nutrition as a viable career.”
- “There is no degree that prepares individuals for the position of SN director.”

#### *Developing School Nutrition Directors Internally*

During a discussion about the internal talent pool for SN directors, the themes that emerged were access to qualified talent, sources of talent, ways to cultivate internal talent, and barriers to education standards. Two comments regarding sources of internal talent were, “Middle management positions many help some step up to the director position,” and “A floating manager is a position that provides experience and exposure.”

Multiple comments were made about cultivating internal talent:

- “Promising employees should be sent to their SNA state leadership conference.”
- “Some SN employees who are sent to the SNA state leadership conference do not have the education or qualifications to be SN directors, and many are not willing to relocate for a SN director position.”
- “School nutrition directors should develop formal training programs within their districts.”

- “At the state level, Mississippi has some training activities for SN managers.”
- “Some districts in Louisiana provide SN management courses that are offered either face-to-face or in self-study form.”

Two comments were offered regarding barriers to education standards:

- “It is difficult to be promoted from manager to SN director because of the college degree requirements.”
- “Many SN employees have the skills to be SN directors, but no formal degree.”

### *Attracting School Nutrition Directors Externally*

A discussion of external talent and advantages to choosing a career in SN management versus other foodservice management fields yielded multiple comments. The sources of talent discussed included:

- “Dietetic interns;”
- “Registered dietitians looking to get out of clinical nutrition;”
- “School nutrition directors from other districts;”
- “School nutrition managers from other districts;”
- “State agency personnel;” and
- “Foodservice managerial staff from chain restaurants, hospitals, and foodservice management companies.”

Comments about the advantages of choosing a career in SN management included:

- “Better work hours;”
- “Greater job stability/security;”
- “Higher salaries;”
- “Better benefits;”

- “Convenience, if you have children in same school;”
- “Autonomy;”
- “No competition;” and
- “Peer support.

### ***General Advantages of Succession Planning***

Expert panel members identified three advantages associated with succession planning. One panelist stated, “Succession planning promotes sustainability of quality SN programs.” Another panelist indicated that succession planning would ultimately lead to improved meals for kids. Several panelists agreed that succession planning would increase the credibility of the foodservice industry, which will help attract more qualified people.

### ***General Barriers to Succession Planning***

Panelists provided multiple comments regarding barriers to succession planning. Some panelists cited “collective bargaining” as a barrier, because it “hinders putting the right person in the right job.” Panelists mentioned, “getting people to buy into succession planning,” and “finding champions within the district” as barriers. Other barriers noted included, “lack of knowledge about the job and needed training;” “administrative commitment and support;” “a limited talent pool;” “dwindling resources;” and “public perception of the field of SN management.”

### ***Resources Needed***

The members of the second panel did not give recommendations for further research regarding succession planning, but they did provide suggestions for resources to promote succession planning. The suggestions included “an outreach guide for SN directors to market SN management to local high school students,” and “a turnkey succession planning resource for



school districts.” Panelists suggested the turnkey resource be concise and easy to access and contain the following items:

- “A checklist of succession planning activities;”
- “An SN director job description template;”
- “Recommendations regarding credentials and years of experience for SN directors based on district size;”
- “Sample interview questions;” and
- “A list of the best places to post position announcements for SN directors.”

## CONCLUSIONS AND RECOMMENDATIONS

The importance of succession planning for school nutrition (SN) directors is apparent; however, it appears that many of the school district officials making the hiring decisions are not aware of this issue or of the necessary qualifications of SN directors. School nutrition professionals concur that much can be gained by engaging in local and national succession planning, such as increasing the availability and retention of qualified talent and promoting sustainable quality in SN programs. To achieve these gains, several challenges must be overcome:

- Changing public perception of the profession of SN management;
- Gaining administrative support and commitment for SN director succession planning;
- Growing the supply of individuals interested in the field of SN management;
- Increasing avenues for developing SN talent;
- Coordinating the activities related to succession planning among SN professional organizations; and
- Working with limited financial resources to accomplish these objectives.

It appears that some degree of succession planning is occurring at the local, state, and national levels for SN directors; nonetheless, more coordination is likely needed within and among each level. At the local level, succession planning is not occurring in some school districts, informally in other school districts, and formally in a small percentage of school districts.

At the state level, some agencies appear to be very proactive regarding succession planning for SN directors, such as developing SN internship programs, contacting colleges about developing SN degree programs, offering SN certification, and/or providing education to help

prepare individuals to take the School Nutrition Specialist (SNS) certification exam. Yet, the level of succession planning at each state agency varies, with limited coordination occurring between state agencies or between state agencies and the School Nutrition Association (SNA).

At the national level, Congress, the SNA, and the National Food Service Management Institute (NFSMI) have each made contributions to succession planning for SN directors. The Healthy, Hunger-Free Kids Act 2010 requires the establishment of education, training, and certification standards for all SN directors (111<sup>th</sup> Congress 2D Session, 2010). The SNA currently has two university-based, school nutrition, pilot internship programs; each independent of a dietetics curriculum. In 1997, the SNA created the SNS credential (School Nutrition Association, 2010a; School Nutrition Association. [2013b]). The purpose of the SNS credential was to enhance the image, professional standards and performance of SN directors. Achieving this credential requires passing an exam that evaluates knowledge and skills specifically related to directing an SN program. In 2009, the Applied Research Division of the NFSMI helped achieve step two of Rothwell's succession planning model, "assessing current and future requirements of SN directors" by revising the *Competencies, Knowledge, and Skills for District-Level School Nutrition Professionals in the 21<sup>st</sup> Century* (Nettles, Carr, and Asperin, 2009).

Education, experience, and, to a lesser degree, credentials, should be considered when establishing qualifications for SN directors. The level of education for SN directors should be reviewed for a few reasons.

- The Healthy, Hunger-Free Kids Act 2010 stipulates the establishment of education and certification standards for SN directors. (111<sup>th</sup> Congress 2D Session, 2010).

- Most SN directors and school administrators agree that a bachelor's degree is desired; however, many concede this may be a difficult goal to achieve, especially in small rural districts.
- With regard to education, field of study is an important issue. There are very few college programs in the United States specifically aimed at SN management, and most of the degree programs with SN management potential (i.e., hospitality management, business management, nutrition/dietetics) lack a practical experience component specific to SN management.

When considering work history as a qualification, it appears SN experience is essential. Applicants may meet this qualification by participating in an SN internship or practicum, or by working in a SN program. However, such a qualification may be an impediment, as internships and practicums are in limited supply, and the education requirement for most SN director positions is too great of an obstacle for many SN employees to overcome.

Most SN directors and school administrators do not perceive credentials such as SNS or Registered Dietitian as a necessary qualification for the position of SN director (Rushing, Nettles, and Johnson, 2009). However, the Healthy, Hunger-Free Kids Act 2010 mandates the establishment of a certification requirement for all SN directors (111<sup>th</sup> Congress 2D Session, 2010).

Results of this study suggest several areas, both national and local, that should be considered when looking for a solution:

- Marketing to promote interest in the profession;
- Internships and practicums to provide experience;
- Internal development of SN employees;

- Mentoring opportunities for new SN directors;
- Resources to support local school districts in succession planning; and
- Research to support succession planning.

Locally and nationally, SN professionals must increase endeavors to promote the profession of SN management to the general public. These efforts should be coordinated from the top down, with SNA taking the leadership role. Marketing responsibilities should be identified for all levels, including national and state SNA representatives, state agencies, and district level SN directors. The target audience for the marketing message should include:

- Elementary and middle school students;
- High school students;
- College/university faculty and educators in high-potential programs;
- Community college and university students majoring in high-potential programs; and
- School district decision makers (i.e., administrators, human resource officers; and business officers).

The goals of these marketing efforts should be to:

- Elevate the public's image and perception of the profession of SN management;
- Improve college/university professionals' understanding of the educational experiences needed by SN directors and of the career opportunities available for SN directors;
- Heighten high school and college students' understanding of the role and responsibilities of SN directors and the benefits of choosing a career in SN management; and
- Educate school district decision makers on the scope of responsibilities, the ideal qualifications, and the importance of hiring the right candidates for the position of SN director.

At the college level, there is a need for SN professionals to increase opportunities for students interested in this field to receive practical experience. These may include:

- Developing more SN internship programs;
- Establishing SN practicums with different university degree programs, such as nutrition, hospitality management, and community health;
- Creating financial aid incentives for individuals choosing to participate in these degree programs; and
- Formulating modified distance internships or practicums to help meet the needs of students who are unable to travel outside of their local area.

The SNA and/or NFSMI should define what mentoring looks like, such as the essential steps involved in mentoring. Then, state agencies could foster mentoring opportunities for new SN directors. It would be beneficial if state agencies collected the names of new SN directors wishing to have a mentor and also of experienced SN directors willing to be mentors and pair these two groups together based on proximity and needs.

Multiple succession planning resources are needed to support local school districts. School nutrition directors need items to promote the field of SN management, such as Web sites, brochures, and a checklist of outreach activities to promote the profession within the school district and local community. Templates are needed by SN directors to develop or help develop internships and practicums, including specified student activities and experiences. School districts need Web sites with tools to help conduct internal and external SN director talent searches, such as job descriptions with qualifications based on school district size, interview questions, and places to post job listings (i.e., journals, Web sites, etc.).

With regard to further research, the SN profession expert panel provided several recommendations. It was suggested that research be conducted to determine what is being done by each state agency with regard to succession planning. This would be beneficial to determine best practices. It was recommended that a study be conducted to find out what career decisions dietetic students make when they do not get accepted into internships. Since some of these students may be a good fit for the SN profession, it would be interesting to know how many of these individuals would be interested in pursuing a career in SN management. It was proposed that a study be conducted to evaluate how well dietetic educators prepare students related to SN standards, such as the *Keys to Excellence and Competencies, Knowledge, and Skills for District-Level SN Professionals in the 21<sup>st</sup> Century* (Nettles, Carr, and Asperin, 2009). However, some individuals believe that Registered Dietitians are not the best prepared candidates for SN directors. A study such as this may provide an explanation. It was offered that a study be directed to determine the following: characteristics school district officials seek in a SN director; the criteria they use to select SN directors; their perceptions of the profession; and their assessment of the skills of SN directors. This information would be useful for developing district level succession plans. Lastly, it was suggested that focus groups with college students and hospitality professors/professionals be organized to determine what these groups know about SN programs, and their exposure to and perceptions of SN programs. This insight would be useful in developing strategic marketing plans at the national level.

There are many opportunities for the profession of SN management with regard to succession planning. However, succession planning is but one issue facing the profession. Therefore, a narrowed list of higher priority recommendations is provided for the more immediate future based on three categories, marketing, research, and resources.

Concerning marketing, as stated earlier, the SNA should take the lead role on a national plan. Recommendations for establishing this plan have been provided above.

With regard to research, it is recommended that four studies be considered:

- Identification of succession planning activities conducted by each state agency;
- Exploration of the career decisions of dietetics and nutrition students who did not complete dietetics internships;
- Identification of hospitality stakeholders' (professors, students, industry professionals) perceptions of and exposure to the field of SN management; and
- Identification of professional activities for face-to-face and distance SN internships and practicums.

It is recommended that three resources be developed to promote succession planning at the district level:

- Tools to promote the field of SN management;
- Templates for creating internships and practicums; and
- A list of Web sites that are beneficial for conducting talent searches.

Resources to promote the field of SN management should be based on a coordinated marketing plan; therefore, it is recommended that this activity occur after a national marketing plan is developed. The creation of templates for face-to-face and distance internships and practicums may require further research; therefore, it is recommended that this activity occur after that research has been completed. Recommendations for creating a Web site with instruments to help conduct a talent search have been provided above.

This study demonstrates the importance of succession planning for local school districts and the profession of school nutrition. Further, SN professionals have identified strategies to help



make this a reality. School nutrition leadership at the local and national level are encouraged to address the preceding suggestions and take action.

## REFERENCES

- 111<sup>th</sup> Congress 2D Session. (May, 2010). *Healthy, Hunger-Free Kids Act of 2010* (S.3307, Report No. 111–178). Retrieved from <http://ag.senate.gov/site/ComLeg/s3307.pdf>
- Atwood, C. G. (2007). *Succession Planning Basics*. Baltimore Maryland: American Society for Training and Development.
- Nettles, M. F., Carr, D. H., Johnson, J. T. & Federico, H. A. (2006). *Exploring Operational Issues and Practices of School Nutrition Programs in Large School Districts*. University, MS: National Food Service Management Institute.
- Nettles, M. F., Carr, D. H., & Asperin, A. (2009). *Competencies, Knowledge, and Skills for District-Level School Nutrition Professionals in the 21<sup>st</sup> Century*. University, MS: National Food Service Management Institute.
- Rothwell, W. J. (2010). *What is Succession Planning in Management?* (4<sup>th</sup> Ed). Library of Congress Cataloging-in-Publication Data.
- Rushing, K., Nettles, M. F. & Johnson, J. T. (2009). Characteristics and Qualities Needed for Success by SN Directors. *The Journal of Child Nutrition & Management*, 33(2). Retrieved from <http://www.schoolnutrition.org/Content.aspx?id=13244>
- School Nutrition Association. (2013a). *School Nutrition Association's Internship Program*. Retrieved from <http://www.schoolnutrition.org/Content.aspx?id=10702&terms=internship>
- School Nutrition Association. (2013b). *SNS credentialing*. Retrieved from <http://www.schoolnutrition.org/Content.aspx?id=132&terms=sns+credential>



**National Food Service Management Institute**  
The University of Mississippi  
P. O. Drawer 188  
University, MS 38677-0188  
[www.nfsmi.org](http://www.nfsmi.org)

GY 2010 Project 2

© 2013 National Food Service Management Institute  
The University of Mississippi