Food Production Records – Who and When?

Lesson Overview

Lesson Participants: School Nutrition Assistants/Technicians

Type of Lesson: Short face-to-face training session

Time Needed to Conduct the Lesson: 20 minutes

Lesson Description: This lesson explains the importance of using food production records. The instructor will discuss the food production record and the information it includes. The activity is used to introduce who should assist in completing the food production record and when the food production record is to be completed. The lesson is designed for managers to teach school nutrition assistants/technicians.

Lesson Objectives:
At the end of this lesson, the participant will be able to:
1. Identify who should participate in completing the food production record.
2. Discuss when the ideal times are for completing the food production record.

Get Ready to Train

Note: This lesson is one of three lessons on food production records. This lesson should be taught following the lesson on Food Production Records – What and Where?

The format for the No Time to Train lessons includes an overview, preparation checklist, lesson at a glance with timeline for conducting the lesson, references, and an instructor’s script. The manager/instructor will use the script to present the lesson to the participants. The script gives directions to the manager/instructor—DO, SAY, ASK, LISTEN, AND ACTIVITY—to deliver the lesson.

No special audiovisual or electronic equipment is needed to conduct the lesson. The lesson can be presented in the cafeteria, media center, or classroom.
**Preparation Checklist**

**Directions:** Use the Preparation Checklist to prepare for the training session. Track your progress by checking off the tasks as they are completed.

<table>
<thead>
<tr>
<th>Done</th>
<th>Lesson Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

### Gather Materials

**Materials Needed:**

- [ ] Instructor’s Script
- [ ] Handout 1: Production Record for Food-Based Menu Planning (one for each participant)
- [ ] Handout 2: Who and When? (one for each participant)
- [ ] Handout 3: Who and When with Suggested Answers (one for each participant)
- [ ] Pencils (one for each participant)
- [ ] Session Evaluation form (one for each participant)

### Prepare for Lesson

**Before the Training:**

- [ ] Make copies of Handouts 1, 2, and 3 (one for each participant).
- [ ] Make copies of Session Evaluation form (one for each participant).

**On Training Day:**

- [ ] Place pencils on tables (one for each participant).
- [ ] Distribute Handouts 1 and 2 (one to each participant).
- [ ] Distribute Handout 3 at the end the discussion (one to each participant).

**On the Instructor’s Table:**

- [ ] Instructor’s Script
- [ ] Handout 1: Production Record for Food-Based Menu Planning
- [ ] Handout 2: Who and When?
- [ ] Handout 3: Who and When with Suggested Answers
- [ ] Session Evaluation forms
Lesson at a Glance
(20 minutes)

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Task</th>
<th>Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 minutes</td>
<td>Introduction and Overview</td>
<td>Instructor defines production records for menu planning.</td>
<td>Instructor’s Script</td>
</tr>
<tr>
<td>7 minutes</td>
<td>Objective 1: Identify who should participate in completing the food production record.</td>
<td>Introduce and distribute an example of the school district food production record or use Handout 1.</td>
<td>Handout 1: Production Record for Food-Based Menu Planning</td>
</tr>
<tr>
<td></td>
<td>Objective 2: Identify when the ideal times are for completing the food production record.</td>
<td>Distribute Handout 2. Participants complete the activity on Handout 2, discuss the activity, and use Handout 3 to check their answer.</td>
<td>Handout 2: Who and When?</td>
</tr>
<tr>
<td>6 minutes</td>
<td></td>
<td>Distribute Handout 3. Instructor leads a discussion on the activity completed.</td>
<td>Handout 3: Who and When with Suggested Answers.</td>
</tr>
<tr>
<td>3 minutes</td>
<td>Wrap up and Review</td>
<td>Instructor reinforces lesson and encourages participants to ask questions and to make comments.</td>
<td></td>
</tr>
<tr>
<td>2 minutes</td>
<td>Session Evaluation</td>
<td>Conduct a short evaluation of the lesson.</td>
<td>Session Evaluation form</td>
</tr>
</tbody>
</table>

Note to Instructor: A sample food production record is provided for training purposes. If your state or district requires a specific production record, use that one and adjust the activity accordingly. Check with your state agency to determine if there is a preferred form prior to using this lesson.

Definition: Federal guidelines require that all schools participating in the school meals programs must keep food production records for the meals they produce. These records must demonstrate how the meals contribute to the required food components, food items, or menu items for each day of operation. In addition, these records must provide sufficient documentation to determine how the school meals contribute to meeting the age/grade appropriate nutrient standard over the school week.

References:

Instructor’s Script

SAY:
Today we are going to discuss the persons (who) and the times (when) to complete the food production records for menu planning. Food production records are required for all menu options. The formats can be different.

Because staff members are assigned different tasks in the process of planning and serving meals, it can be difficult for one person to be responsible for completing the food production record. That is why it is a good idea to assign recordkeeping responsibilities to different members of the kitchen staff.

Recordkeeping assignments that reflect the actual work performed by a particular person will ease the process of ensuring that the food production records are complete and accurate. This eliminates the burden of one person trying to collect all the needed information from others.

Let’s look at a sample food production record that is being used in menu planning.

DO:
Use the school district sample or distribute Handout 1: Production Record for Food-Based Menu Planning.

SAY:
Our goal is to identify who should participate in completing the food production record and when those individuals should record the information for which they are responsible on the food production record. Using Handout 1, let’s identify the assigned persons and when those persons should record the necessary information.

1. The menu planner, a dietitian or food service director, plans the menu planning system and cycle menus far in advance, before the menu is distributed to the individual kitchens. Take a look at Handout 1. The menu planner is responsible for recording the appropriate information in the Food Item Used and Form column, the Recipe or Product column, the Grade Group column, and the Portion Size column.

   The menu planner completes their portion of the food production record prior to distributing the record to individual kitchens.

2. The kitchen manager needs a food production record from the menu planner for menu planning before he or she can make food production staff assignments. Look again at our sample food production record. The kitchen manager assigns each food item for preparing to a technician and completes the Person Responsible column. The manager forecasts the Student Projected Servings and the Total Projected Servings and fills in the appropriate columns on the food production record. The kitchen manager keeps the historical records that are used for forecasting the next time the menu is served. In addition, the kitchen manager has to date and sign the
daily production record at the end of meal service.

3. The food nutrition assistants/technicians can record the information on the second part of the food production record after the meal has been served to customers. The staff can complete the Amount of Food Used column, the Student Servings column, the À la Carte Servings column, the Adult Servings column, and the Leftovers column.

It is very important that the entire production record is completed at the end of the day that the meal is served. Accuracy fades as time extends. It is easiest to remember what was done on the day of service.

To reinforce what we have learned, let’s do an activity. We are going to identify recordkeeping assignments that reflect the actual work performed by assigned persons (who) and at what time information needs to be recorded on a food production record (when). Know that some information can be recorded ahead of time, but the menu production record for the meal each day needs to be completed at the end of service.

ASK:
Ask participants to divide into small groups of 2 or 3.

DO:
Distribute Handout 2: Who and When?

SAY:
Look at Handout 2 and read the description in center column - Information to be Recorded. In the left column, the Who column, write in the person you believe should be responsible for recording the information on the food production record. Then on the right column, the When column, write in when you think that information should be recorded.

ACTIVITY:
Participants will take a few minutes in their groups to complete Handout 2.

DO:
Allow a few minutes to complete the activity.

ASK:
Ask participants to share their answers.

LISTEN:
Listen to group responses for Handout 2.
SAY:
Let’s be sure you have the correct answers on Handout 2. Use Handout 3 to verify your answers are correct.

DO:
Distribute Handout 3: Who and When with Suggested Answers.

SAY:
Let’s take a few minutes and review what we’ve just learned.

The task of completing the food production record can be divided among the menu planner, the kitchen manager, and food nutrition assistants/technicians to ensure it is complete and accurate. All the information has a specific time that it should be recorded. The first part of the food production record is completed by the menu planner before the menu is distributed to the individual kitchens. The kitchen manager completes his or her part before food production takes place. Food nutrition assistants/technicians can complete their portion of the food production record during and after the food production service is performed.

It is important to remember that all of the required information must be in the correct columns in order for the food production record to be complete and useful. Kitchen managers will use the data food production records provide to forecast information needed for food production in the future. Federal reimbursement can be affected if information is missing or inaccurate from the meals served and claimed. Federal guidelines require that the daily food production records be kept on file for three years plus the current year.

ASK:
Do you have any other comments or questions about why food production records are required and useful?

LISTEN:
Listen to individual responses. Answer questions to the best of your ability. If there are questions you can’t answer, tell participants you will find out the answer and let them know later. If you need assistance in finding answers, please call the National Food Service Management Institute at 800-321-3054.

DO:
Distribute the Session Evaluation form.

SAY:
Thank you for participating in the lesson today. Please take a few of minutes to complete the Session Evaluation form. Thank you for your input.
Handout 1: Production Record for Food-Based Menu Planning

Food-Based Production Record  
(Traditional or Enhanced)

**Site** Summitville Elementary  
**Meal Date** May 14

*Portion Size: Must be same as planned. Use separate line if adjusted for age.  
**Amount of Food Used: Based on USDA Food Buying Guide or USDA recipe.*

<table>
<thead>
<tr>
<th>Food Item Used and Form</th>
<th>Recipe or Product (name or #)</th>
<th>Person Responsible</th>
<th>Grade Group</th>
<th>Portion Size* (#/wt./qty.)</th>
<th>Student Projected Servings</th>
<th>Total Projected Servings</th>
<th>Amount of Food Used** (lb. or qty.)</th>
<th>Student Servings</th>
<th>A La Carte Servings</th>
<th>Adult Servings</th>
<th>Leftovers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meat/Meat Alternate</strong></td>
<td>Salisbury Steak</td>
<td>D-23</td>
<td>Sue</td>
<td>1 each 5 ea/4 oz</td>
<td>200</td>
<td>220 serv</td>
<td>195</td>
<td>10</td>
<td>5</td>
<td>15 serv</td>
<td>2.5 lb</td>
</tr>
<tr>
<td></td>
<td>Chicken Nuggets</td>
<td>Brand X</td>
<td>Yolanda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Vegetable/Fruit</strong></td>
<td>Baked potato, 5 oz, 1/25</td>
<td>Akiko</td>
<td>K-6</td>
<td>1 each 1/8 c</td>
<td>250</td>
<td>250 serv</td>
<td>235</td>
<td>10</td>
<td>5</td>
<td>40 each</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Carrot sticks, pre-cut</td>
<td>Akiko</td>
<td></td>
<td>1/8 c</td>
<td>250</td>
<td>250 serv</td>
<td>235</td>
<td>5</td>
<td>1/2 lb</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Broccoli flowers, pre-cut</td>
<td>Akiko</td>
<td></td>
<td>1/8 c</td>
<td>250</td>
<td>250 serv</td>
<td>235</td>
<td>5</td>
<td>1/2 lb</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tomatoes, cherry, fresh</td>
<td>Akiko</td>
<td></td>
<td>1/8 c</td>
<td>250</td>
<td>250 serv</td>
<td>235</td>
<td>5</td>
<td>1/2 lb</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cherry Cobbler</td>
<td>C6</td>
<td>Akiko</td>
<td>25 serv/pan 1 square</td>
<td>500</td>
<td>500 serv</td>
<td>485</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Grains/Breads</strong></td>
<td>Whole-Wheat Roll</td>
<td>Brand X</td>
<td>Yolanda</td>
<td>1 each</td>
<td>200</td>
<td>220 serv</td>
<td>195</td>
<td>10</td>
<td>15 each</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>BBQ Sauce</td>
<td>Brand Z</td>
<td>Akiko</td>
<td>portion pack/1 ea</td>
<td>300</td>
<td>305 serv</td>
<td>290</td>
<td>5</td>
<td></td>
<td>10 each</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lowfat Ranch Dressing</td>
<td>Brand Q</td>
<td>Akiko</td>
<td>portion pack/1 ea</td>
<td>300</td>
<td>350 serv</td>
<td>300</td>
<td>10</td>
<td></td>
<td>40 each</td>
<td></td>
</tr>
</tbody>
</table>

Handout 2: Who and When?

The goal of this activity is to identify who is responsible for completing certain parts of the food production record and when they should record the information for which they are responsible. Remember that recordkeeping assignments that reflect the actual work performed by a particular person will ease the process of ensuring that the food production records are complete and accurate. Know that information can be recorded ahead of time, but the menu production record for the meal each day needs to be completed at the end of service. The questions asked should be:

Who are the assigned persons needed for recordkeeping? Choices:
(a) Menu Planner  
(b) Kitchen Manager  
(c) Food Nutrition Assistants/Technicians

When should the information be recorded? Choices:
(d) During and after the food production and service  
(e) Before food production  
(f) Before the menu is distributed to individual kitchens

Directions:
Read the information described in the center column (Information to be Recorded). Using the choices above, on the left column (Who) write in the person that you believe should be responsible for recording this information on the food production record. Then, on the right column (When), write in when you think that information should be recorded. When asked, be able to explain your answer.

<table>
<thead>
<tr>
<th>Who</th>
<th>Information to be Recorded</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This person records the <strong>Food Item Used and Form, Recipe or Product, Grade Group, and Portion Size</strong> for the purpose of communicating consistent information.</td>
<td>4.</td>
</tr>
<tr>
<td>2.</td>
<td>This person records information on the <strong>Amount of Food Used</strong> (in purchase units, for example: lb, No. 10 cans, cases, qt, etc.); <strong>Student Servings, À La Carte Servings, Adult Servings</strong>; and <strong>Leftovers</strong> (or Shortages).</td>
<td>5.</td>
</tr>
<tr>
<td>3.</td>
<td>This person assigns each food item to an assistant and records in the <strong>Person Responsible</strong> column and forecasts the <strong>Student Projected Servings</strong> column and <strong>Total Projected Servings</strong> column.</td>
<td>6.</td>
</tr>
</tbody>
</table>
Handout 3: Who and When with Suggested Answers

The goal of this activity is to identify who is responsible for completing certain parts of the food production record and when they should record the information for which they are responsible. Remember that recordkeeping assignments that reflect the actual work performed by a particular person will ease the process of ensuring that the food production records are complete and accurate. Know that information can be recorded ahead of time, but the menu production record for the meal each day needs to be completed at the end of service. The questions asked should be:

Who are the assigned persons needed for recordkeeping? Choices:

(a) Menu Planner    (b) Kitchen Manager
(c) Food Nutrition Assistants/Technicians

When should the information be recorded? Choices:

(d) During and after the food production and service   (e) Before food production
(f) Before the menu is distributed to individual kitchens

Directions:

Read the information described in the center column (Information to be Recorded). Using the choices above, on the left column (Who) write in the person that you believe should be responsible for recording this information on the food production record. Then, on the right column (When), write in when you think that information should be recorded. When asked, be able to explain your answer.

<table>
<thead>
<tr>
<th>Who</th>
<th>Information to be Recorded</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.  (a) Menu Planner</td>
<td>This person records the Food Item Used and Form, Recipe or Product, Grade Group, and Portion Size for the purpose of communicating consistent information.</td>
<td>4. (f) Before the menu is distributed to individual kitchens</td>
</tr>
<tr>
<td>2.  (c) Food Service Assistant/Technician</td>
<td>This person records information on the Amount of Food Used (in purchase units, for example: lb, No. 10 cans, cases, qt, etc.); Student Servings, À La Carte Servings, Adult Servings; and Leftovers (or Shortages).</td>
<td>5. (d) During and after the food production and service</td>
</tr>
<tr>
<td>3.  (b) Kitchen Manager</td>
<td>This person assigns each food item to an assistant and records in the Person Responsible column and forecasts the Student Projected Servings column and Total Projected Servings column.</td>
<td>6. (e) Before food production</td>
</tr>
</tbody>
</table>
Session Evaluation

Instructions: Completely fill in the circle of your answer. Use a #2 pencil. Please select only one response for each statement. Do not fold or crease this sheet.

Title of Meeting: ____________________________________________________________
Session Topic: _____________________________________________________________
Date: _______________ Time Slot: ______________ Location: _______________
Length of Event (hrs/min): ______________

Trainer's Code: ____________________________________________________________

Attendee Status:  
☐ District director  ☐ Major city director  ☐ Private consultant/trainer
☐ State agency staff  ☐ Site-level manager  ☐ Foodservice assistant
☐ Educator  ☐ Other (please list) _____________________________________________

<table>
<thead>
<tr>
<th>Reaction to this Session</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The session objectives were clearly presented.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>2. The session objectives were achieved.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>3. I can apply what I learned in this session to my job.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>4. Attending the session increased my skill on the topic.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>5. Attending the session increased my knowledge on the topic.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>6. I would recommend this session to others.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
<tr>
<td>7. Overall, the session met or exceeded my expectations.</td>
<td>☐ 5</td>
<td>☐ 4</td>
<td>☐ 3</td>
<td>☐ 2</td>
<td>☐ 1</td>
</tr>
</tbody>
</table>

Comments about this Session

The information I found MOST useful was:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Please share any additional comments:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

National Food Service Management Institute - The University of Mississippi