



Competencies, Knowledge, and Skills
for School Nutrition Managers in the 21st Century
Phase II

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Competencies, Knowledge, and Skills for School Nutrition Managers in the 21st Century – Phase II

TECHNICAL REPORT

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PURPOSE

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

MISSION

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

VISION

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

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COMPETENCIES, KNOWLEDGE AND SKILLS FOR SCHOOL NUTRITION MANAGERS

Executive Summary

School nutrition (SN) managers assist and supervise child nutrition programs that provide nutritious meals and snacks to children in schools across the United States. The role of the SN manager is pivotal for planning and supervising school foodservice operations, and insuring compliance with child nutrition, health, and safety guidelines. To assist SN managers with meeting these roles effectively, successful school programs utilize competencies, knowledge, and skills to create performance standards, and to ensure that resources utilized for the child nutrition program are efficient and effective for meeting program expectations.

The Institute of Child Nutrition, Applied Research Division (ICN, ARD), has used the Model for Developing Competent Performance that was created in the 1900s to establish protocols to evaluate child nutrition professionals' performance, knowledge, skills, and training needs. For the current research project, the ICN, ARD conducted a study to create competencies and to confirm knowledge and skill statements for SN managers. The study was conducted in two phases. In the first phase, researchers conducted an electronic expert panel using a modified Delphi technique, SN site visits, and focus groups to identify and update functional areas for SN managers in various settings, and to develop draft knowledge and skill statements related to each functional area. In the second phase, researchers confirmed the knowledge and skill statements identified in the first phase, and created competencies using an expert-panel work group and a review panel. The results of the second phase yielded 39 competency, 165 knowledge, and 342 skill statements for the development of a resource, and three user-friendly tools for SN managers.

The resource, *Competencies, Knowledge, and Skills for School Nutrition Managers*, was developed to assist SN administrators with identifying the knowledge and skills required for effective SN managers. The resource contains eight functional areas with 39 competencies, 165 knowledge statements, and 343 skill statements. (One skill statement was divided into two statements for clarity in the technical report.) The resource also includes three modifiable tools to assist administrators with using the resource to meet their program needs. The tools included are a job description template, a peer-to-peer mentoring form, and a performance appraisal form. Also included are instructions to clarify how each tool may be used in the following ways: to facilitate the hiring process; to identify, create, and address training and performance challenges and issues; and to establish mentoring relationships among SN directors and managers.

Introduction

Child nutrition programs provide nutritious meals to children in schools across the United States. Since the inception of the National School Lunch Act of 1946, federal and state government agencies have established standards, administration, and supervision to ensure funding for child nutrition programs, to provide nutrition standards, and to verify policies are implemented. Successful school nutrition (SN) programs utilize competencies, knowledge, and skills to create performance standards (Martin, 1999); to guide efforts to support employee performance; to measure job responsibilities and behaviors; and to show how well employees perform in their individual and team-related roles to meet organizational goals (Poovathingal & Kumar, 2018). Child nutrition administrators recognize the benefits of utilizing competencies, knowledge, and skills to ensure that resources used for the organization are economical, efficient, and effective for meeting expectations (Martin & Oakley, 2008). The Institute for Child Nutrition, Applied Research Division (ICN, ARD) has conducted research and developed the competencies, knowledge, and skills for child nutrition professionals for more than 20 years. In 1995, initial studies were conducted to establish a research-based competency model for entry-level and experienced SN managers. In 1996, a resource was developed and published, and identified the competencies, knowledge, and skills for SN managers. Since that time, the ICN, ARD has conducted periodic studies and developed resources in 2003 and 2007 that identified and updated competencies, knowledge, and skills for SN managers (Cater & Carr, 2004; Cater & Carr, 2007).

The ICN *Model for Developing Competent Performance* continues to be utilized to provide child nutrition administrators with a set of standards to evaluate staff performance, abilities, and training needs (Cater & Carr, 2004). Changes in child nutrition policies, foodservice trends, and child nutrition program expectations have prompted the need for change

in competencies, knowledge, and skills for SN managers. These changes include updating the traditional competent performance model to meet current performance standards, and updating the prior resource to meet the demand for SN professionals who supervise and coordinate programs in accordance to Child Nutrition policies. By revising the competencies, knowledge and skills for SN managers, the ICN, ARD continues its tradition of providing credible research-based information that can be used to assist school-site managers in meeting the needs and expectations of child nutrition programs.

Starting in 2016, a multi-phase competencies, knowledge, and skills for SN managers research project was conducted by ICN, ARD. The first half was conducted in three phases. The previous version of the *Competencies, Knowledge, and Skills of Effective School Nutrition Managers* resource, published in 2004, served as the foundation for the first phase of this current research project (Cater, Cross, & Nettles, 2017). Researchers conducted an electronic expert panel, using the Delphi technique, to identify and update functional areas that encompass the responsibilities of SN managers. In the second phase, researchers conducted site visits at four school districts in four United States Department of Agriculture regions of the country to observe SN managers' daily activities, and to determine the managers' views of his/her responsibilities and duties. The purpose of the site visits was to begin the process of drafting knowledge and skills needed to be an effective SN manager. In the third phase, the researchers conducted focus groups in three states in the United States. The focus groups were utilized to develop updated draft knowledge and skills needed for effective SN managers. Summarizations from site visits, focus groups, the *Competencies, Knowledge, and Skills of Effective School Nutrition Managers* resource, printed publications, and Internet sources were used to identify, confirm, and draft eight functional areas, 191 knowledge statements, and 384 skill statements (Cater, Cross, & Nettles, 2017). This phase of the project established the foundation to determine the

competencies related to each functional area, and the knowledge and skill statements that detail the duties of an SN manager for the second half of the research project.

Research Objectives

The purpose of this study was to identify the competencies, and to confirm knowledge and skills needed by SN managers supervising and coordinating school foodservice operations across the United States. The objectives are below:

- Confirm the validity and classification of knowledge and skill statements under functional area categories for SN managers;
- Identify and confirm competencies necessary to perform job responsibilities and the manager's level; and
- Develop a competencies, knowledge and skills resource for SN managers.

Methodology

Research Plan

The second half of the research project was conducted in three phases. Phase I utilized an expert panel consisting of State agency personnel, school nutrition (SN) directors, SN managers, child nutrition education and training specialists, and an Institute of Child Nutrition (ICN) Education and Training Specialist to reach agreement and to confirm the knowledge and skill statements needed under each functional area previously identified in the first half of the project and group them into categories. For Phase II, the findings in Phase I were used to develop competencies for each of the grouped categories of knowledge and skill statements, and they were sent to expert-panel members to confirm their placement and relevance. In Phase III, a survey of the competencies, knowledge and skills statements under each functional area was sent to a review panel comprised of United States Department of Agriculture (USDA) and State agency personnel, SN directors, SN managers, child nutrition education and training specialists, and an ICN Education and Training Specialist to make the final confirmation of statements for the development of the resource.

Phase I

Expert panel.

The list of potential project participants used in the first half of the study was used to identify State agency personnel, SN directors, SN managers, child nutrition education and training specialists, and an ICN Education and Training Specialist for the expert and review-panel members. From this pool of names, twelve participants were e-mailed and invited to participate in a day-and-a-half meeting to identify the competency groupings, and to confirm knowledge, and skills of effective SN managers.

Of the twelve potential participants invited, 11 agreed to serve on the expert panel for this research project. An additional invitation was sent to and accepted by a potential panelist, bringing the final number of expert-panel members to 12. After the panel members agreed to participate in the project, confirmation letters were e-mailed with information about their travel arrangements and information about the upcoming expert-panel meeting. The participants consisted of two State agency personnel, five SN directors, three SN managers, and two child nutrition education and training specialists representing six of the seven USDA regions.

Knowledge and skill statements.

The initial research conducted by the Institute of Child Nutrition, Applied Research Division (ICN, ARD) was used for the expert panel. For the expert panel, 191 knowledge statements, 384 skill statements, and all eight confirmed and validated functional areas were used for Phase I of the second half of the project.

Expert-panel, work-group session.

Prior to the one-and-a-half-day, work-group session, the researchers e-mailed expert-panel participants a pre-meeting packet which included a cover letter, instructions, and one pre-meeting document that contained the draft knowledge and skill statements. Expert-panel members were asked to review each proposed knowledge and skill statement, and to then indicate their agreement as to whether the statement was a valid representation of a knowledge or skill needed by SN managers. They were also given the opportunity to provide additional comments, if desired. Members of the work group were advised to bring the completed pre-meeting assignment form to utilize at the work group, to give it to the researchers at the close of the expert-panel session.

The expert, work-group meeting was facilitated by two researchers who were assisted by the ICN, ARD research team and an ICN Education and Training Specialist as recorders to

capture panelists' comments. Expert-panel members were split into groups and asked to complete the following tasks:

- Review the wording of the functional area definitions;
- Review the wording of each knowledge and skill statement, and then take action;
- Confirm, delete, or revise the draft knowledge and skill statements into categories under the appropriate functional areas;
- Decide if there are any missing knowledge/skill statements, and recommend wording;
- Come to agreement on the knowledge and skill statements for each functional area; and
- Categorize the knowledge and skill statements into similar competency categories under the functional areas.

The expert-panel participants were broken into sub-groups during the work-group session to evaluate the functional area definitions and supporting definitions, and to draft knowledge and skill statements. The first responsibility of the group was to evaluate the definitions for the eight functional areas for SN managers. The eight functional areas were:

- Personnel Management;
- Sanitation, Safety, and Security;
- Facility and Property Management;
- Marketing, Communication, and Customer Service;
- Procurement and Inventory Management;
- Nutrition and Meal Management;
- Financial Management and Accountability; and
- Meal Preparation and Service.

Each sub-group was charged to discuss the definition options for each functional area and for the SN managers, and to reach consensus for their group's recommendations. The sub-group tasks were to: 1) choose one of the provided definitions for the functional areas and the SN manager, or 2) modify the wording of a definition. The following process was used to review the definition statements:

- Review the definition for each of the validated functional areas.
- Review the definition for SN manager and determine if it reflects what SN managers serve in current SN settings across the country.

The next responsibility of the expert-panel participants was to evaluate the draft knowledge and skill statements. Each sub-group discussed three options for each knowledge and skill statement and reached consensus for their group's recommendations. The groups had to: 1) accept the statement with no changes; 2) delete the statement; or 3) modify the wording of the statement. The sub-groups used the following process when reviewing the draft knowledge and skill statements:

- Review each statement, and decide if it reflects the roles and responsibilities of SN managers;
- Discuss comments from the review of the pre-meeting document;
- Decide on action to take for each knowledge and skill statement;
- Categorize the knowledge and skill statements under the appropriate functional areas;
- Decide if there are any missing knowledge and skill statements, and recommend wording for those statements;
- Write new statement(s) and place the statement(s) into a functional area(s); and

- Use the summary form to verify that the group has not overlooked any knowledge and skill statements, and to capture the revised wording of any statements.

Once the sub-groups completed their assignments, the researchers used consensus-building steps to reach agreement with expert-panel members on a course of action to take for the wording of the knowledge and skill statements and the placement of statements into the functional areas. As each functional area was discussed, the researchers summarized the discussion concerning the course of action for each statement. The ICN, ARD researchers also used the consensus-building time to allow panel members to respond to any other concerns they had with the functional area definitions and the categorizing of knowledge and skill statements. Following the work-group session, a researcher used the knowledge and skill statement summary forms and the discussion notes to formulate a summary of the work-group recommendations and to draft the competencies for each set of categorized knowledge and skill statements. Researchers informed the expert panel that a post-expert panel, review process would take place after the panel session ended.

Expert-panel, work-group summary.

A post-expert panel review was required to finalize the knowledge and skill statements and to validate draft competency statements for categorized statements under the functional areas. The review consisted of two rounds of electronic discussions. Each round was conducted by e-mail, with a questionnaire and a summary of the previous rounds sent to each participant in the work group. The expert-panel members were asked to open the file, to review the statement and to complete the questionnaire, and to return it by e-mail as an attachment.

Round 1.

The researchers e-mailed expert-panel members the post-session summary questionnaire, with instructions, to each expert-panel member from the work group. The e-mail outlined the steps to follow when completing the Round 1 questionnaire and the return date for the questionnaire. The Round 1 questionnaire listed the knowledge and skill statements under newly drafted competency statements for each of the functional areas, as identified during the expert panel. Panel members were instructed to complete the following tasks:

- Review knowledge and skill statements for accuracy.
- Indicate agreement or disagreement with the wording of each statement.
- Identify if each statement is placed within the correct functional area (Personnel Management; Facility and Property Management; Financial Management and Accountability; Marketing, Communication, and Customer Service; Meal Preparation and Service; Procurement and Inventory Management; Sanitation, Safety, and Security).

Seven of the 12 (58.3% response rate) expert-panel members returned the Round 1 questionnaire.

Round 2.

The researchers e-mailed the work group a summary of the Round 1 questionnaire results and a Round 2 questionnaire. Since definitions were validated in the first half of the study, and no recommendations for alterations were made in the second half of the study, no definitions were changed. However, clarification and validation for competencies were included in the second round. The expert-panel members were asked to complete the following tasks:

- Review established functional area and functional area definitions.

- Confirm the placement of the knowledge and skill statements into the appropriate competency.
- Confirm whether the knowledge and skill statements are grouped under the appropriate competency.
- Confirm the wording of the competency statements.

The questionnaire was organized by the functional area with the competencies, knowledge and skill statements associated within each functional area included on the questionnaire. Panel members were asked to indicate if the knowledge and skill statements were grouped into the appropriate functional areas. If the panel members did not agree with the grouping of the knowledge and skill statements, they were asked to list the appropriate functional area. After evaluating the grouping of knowledge and skill statements, panel members evaluated the competency statements, and indicated agreement with the competency statements. To address the competency statements, the panel members responded to three statements: “The competency statement accurately reflects the knowledge/skill listed for SN managers;” “The knowledge/skills listed are applicable to the competency statement;” and “The competency statement is appropriate for this functional area.” Finally, the expert panel evaluated the wording of the competency statements by indicating agreement with the wording. If the panel member did not agree with the wording of the competency, they were asked to provide an alternative competency statement. Seven of 12 (58.3%) expert-panel members responded to the final round of discussions. The results of the expert panel and post-expert panel review yielded 45 competencies, 172 knowledge statements, and 336 skill statements under the eight previously confirmed functional areas.

Phase II

Review panel.

At the beginning of this half of the research project, a pool of child nutrition professionals created in the first half of the study was used to select the expert panel and the review panel. The researchers e-mailed the professionals to outline the details of the research study, and included an invitation to participate in the review panel. Fifty child nutrition professionals, representing all seven USDA regions, were selected. Participants consisted of USDA representatives, State agency personnel, SN directors, SN managers, child nutrition education and training specialists, and ICN Education and Training Specialists.

Review-panel survey.

The review-panel survey, *Competencies, Knowledge, and Skills for School Nutrition Managers*, consisted of nine sections. The objectives of this survey are listed below:

- Review established functional areas and functional area definitions.
- Confirm the placement of the knowledge and skill statements into the appropriate competency.
- Confirm whether the knowledge and skill statements are grouped under the appropriate competency.
- Confirm the wording of the competency statements.

The first eight sections of the survey consisted of eight functional areas, 45 competency statements and 507 knowledge and skill statements. Review-panel participants were asked to respond to an electronic survey via SurveyMonkey to indicate the importance of each knowledge and skill statement to the job responsibilities of an SN manager by using a 4-point Likert scale: 1 (*not*), 2 (*somewhat*), 3 (*vital*), or 4 (*extremely*). The participants were also asked to categorize the knowledge or skill statements into one of two categories, “when hired” or “advanced.” After

completing each section of knowledge and skill statements, participants were asked to evaluate the competency statements. Using a 4-point Likert scale ranging from 1 (*strongly disagree*) to 4 (*strongly agree*), review-panel participants indicated their agreement with the following two statements: “The competency statement accurately reflects the knowledge and skills listed,” and “The competency statement is clearly worded.” After all competency, knowledge, and skill statements were addressed, participants were asked to provide demographic information on themselves and their school district, which included job title, years of experience, credentials/certifications, level of education, and USDA region of work location.

Informed consent.

The researchers followed the informed consent procedure established by the Human Subjects Protection Review Committee at The University of Southern Mississippi for the research study.

Data analysis.

The review-panel survey was analyzed using the statistical package SPSS Version 24 for Windows. Descriptive statistics include means, standard deviations and frequencies of total responses.

Results and Discussion

Phase I

Twelve child nutrition professionals attended the day-and-a-half-day expert-panel session. Immediately following the session, expert-panel members participated in a series of follow-up discussions to finalize the list of competency, knowledge, and skill statements. As for the two rounds of group summaries that followed the expert-panel session, seven of the 12 expert panelists completed Round 1 (58.3% response rate), and seven participants completed Round 2 (58.3% response rate).

In Round 1, the expert panel confirmed agreement with the wording of the 191 knowledge statements and 336 skill statements, as well as the placement of these statements under each functional area. Panel members were also given the opportunity to modify existing statements and to add any new additional knowledge and skill statements. The initial list consisted of eight functional areas: Personnel Management; Sanitation, Safety, and Security; Facility and Property Management; Marketing, Communication, and Customer Service; Procurement and Inventory Management; Nutrition and Meal Management; Financial Management and Accountability; and Meal Preparation and Service. The results included eight functional areas, 175 knowledge statements, and 347 skill statements under the eight functional areas.

In Round 2, researchers developed competency statements for each of the grouped categories of knowledge and skill statements under each of the eight functional areas. The expert-panel members confirmed and validated the draft competency, knowledge, and skill statements under each of the functional areas. They were asked to indicate their level of agreement with knowledge and skill statements under drafted competencies for each functional area. There was a 58.3% agreement to accept the modified version of the knowledge and skill

statements presented for review results from the expert panel in Round 1 for Round 2. This resulted in the eight functional areas; 45 competency statements, 172 knowledge statements, and 336 skill statements.

Phase II

Of the 50 SN professionals invited to participate in the review panel, 25 (30%) returned the review-panel survey entitled, *Competencies, Knowledge, and Skills for School Nutrition Managers*. Upon further review of the responses, the researchers discovered that 18 of the 25 respondents did not complete the survey. Due to length of the survey (more than 600 statements), it was determined that the value of all responses answered by participants should be included, since there was no variation in the pattern of responses to suggest otherwise. Furthermore, respondents indicated difficulty completing the survey due to its length and time required for completion. Demographic information is in Table 1. The greatest number of review-panel participants described their job title as “other SN professionals” (50%), followed by “USDA professionals” (30%). “State agency professionals” and “SN directors” each made up to 10% of the respondents.

Table 1

Review-Panel Members' Personnel and Program Characteristics

Demographic Questions	Frequency	%
What best describes your job title? (<i>n</i> =10)		
United States Department of Agriculture (USDA) Professionals	3	30.0
State Agency Professionals	1	10.0
School Nutrition Directors	1	10.0
School Nutrition Managers	0	0
Other SN Professionals	5	50.0
How long have you worked in your current position? (<i>n</i> =10)		
Less than one year	0	0
1-5 years	3	30.0
6-10 years	2	20.0
11-15 years	1	10.0
16-20 years	2	20.0
Greater than 20 years	2	20.0
What is your highest level of education? (<i>n</i> =10)		
High School Diploma or GED	2	20.0
Associate's degree	0	0
Bachelor's degree	3	30.0
Some graduate credits	1	10.0
Master's degree	2	20.0
Graduate hours beyond Master's	1	10.0
Doctoral degree	1	10.0
In what USDA region do you work? (<i>n</i> =10)		
Mid-Atlantic	3	30.0
Midwest	3	30.0
Mountain Plains	3	30.0
Southeast	1	10.0
Northeast	1	0
Southwest	0	0
Western	0	0

Panel members reviewed the competencies, knowledge and skill statements for each of the eight functional areas and rated the importance of each statement to the job responsibilities for SN managers. In addition, review-panel members were asked to categorize each statement into one of two groups, “when hired” and “advanced.” Knowledge and skill statements with a score of 2.5 or higher on a 4-point Likert (agreement) scale indicated that the review panel considered the statement to be important to the current responsibilities of SN managers, and scores less than 2.5 indicated a level of disagreement as to the importance of the statement. The classification of each statement was based on the greatest percentage of responses among the categories “when hired” and “advanced.” Tables 2-9 present the means and standard deviations, as well as the frequencies and percentages for the knowledge and skill categories under the eight functional areas. Review-panel members also reviewed the competencies under each functional area for wording clarity and to determine if the statements accurately reflected the knowledge and skill statements, using a 4-point agreement scale ranging from 1 (*strongly disagree*) to 4 (*strongly agree*). A mean score of 2.5 or higher for each evaluation statement indicated that the respondents agreed that the competency, and the competency was clearly worded. The means and standard deviations for the evaluation of each of the competency statements under all eight functional areas are listed in Table 10.

Functional Area 1: Personnel Management.

The Personnel Management functional area contained eight competency statements and 119 knowledge and skill statements (Table 2). All statements had a mean importance rating of 2.5 or greater, except for one skill statement, “Trains employees to understand the purpose and elements of the profit and loss statement” (2.4 ± 0.7). Because that statement did not meet the mean score of 2.5 or higher, it was eliminated, resulting in a final number of 118 knowledge and skill statements.

Review-panel members identified 78 statements as knowledge or skills needed when professionals are hired. There were 40 knowledge and skill statements in the Personnel Management functional area identified by review-panel members as “advanced.”

There were five knowledge and skill statements that received equal approval for SN managers for “when hired” and at “advanced” levels. Researchers made the final decision for the statements’ placement within the Personnel Management functional area in Table 2. The four knowledge and skill statements determined to be needed “when hired” are listed below:

- “Provides training to employees” was placed under competency 1.2;
- “Knows principles of work simplification” was placed under competency 1.8;
- “Assists employees with organizing work areas for efficient work flow and safety” was placed under competency 1.8; and
- “Encourages employees to take individual responsibility for using sound financial practices in their work duties” was placed under competency 1.8.

There was one skill statement determined to be needed at the “advanced” level, “Employs coaching techniques in conjunction with training to improve employee performance,” listed under competency 1.3.

The review panel’s agreement rating for Personnel Management showed a rating of 2.9 or greater, indicating the panel’s agreement that the competencies accurately reflect the knowledge and skills listed under this functional area (Table 2).

Table 2

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.1: Manages SN operations and staff according to federal, state, and local district laws, regulations, policies and procedures.			
Knows civil rights legislation.	3.3 ± 0.6	12 (48.0)	13 (52.0)
Understands organizational structure of district SN program and lines of authority.	3.2 ± 0.5	13 (52.0)	12 (48.0)
Knows district policies and procedures for selecting, supervising, disciplining, promoting, and terminating employees.	3.5 ± 0.5	10 (40.0)	15 (60.0)
Knows policies and procedures for evaluating employees.	3.5 ± 0.5	11 (45.8)	13 (54.2)
Knows principles of effective delegation.	3.4 ± 0.6	17 (68.0)	8 (32.0)
Knows labor union contract requirements related to the SN program, where applicable.	2.9 ± 0.7	8 (32.0)	17 (68.0)
Knows local, state, and federal legislation pertaining to personnel management.	3.1 ± 0.7	6 (24.0)	19 (76.0)
Knows how to communicate food and nutrition standards/regulations to staff.	3.8 ± 0.4	16 (64.0)	9 (36.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 2 continues)

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.1: Manages SN operations and staff according to federal, state, and local district laws, regulations, policies and procedures.			
Maintains personnel records and documentation as required by the school district.	3.6 ± 0.6	14 (56.0)	11 (44.0)
Follows district policies and procedures in selecting, supervising, disciplining, training, promoting, and terminating employees.	3.7 ± 0.5	14 (56.0)	11 (44.0)
Adheres to union agreement procedures related to the SN program, if applicable.	3.4 ± 0.7	11 (44.0)	14 (56.0)
Follows procedures for responding to union actions and grievances, if applicable.	3.4 ± 0.9	10 (40.0)	15 (60.0)
Ensures employees adhere to district policies and procedures for cash operations and point of service activities.	3.9 ± 0.3	21 (84.0)	4 (16.0)
Maintains employees' contact information in the event of injury or emergency.	3.4 ± 0.5	19 (76.0)	6 (24.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.1: Manages SN operations and staff according to federal, state, and local district laws, regulations, policies and procedures.			
Works with SN administration to implement personnel practices consistent with local, state, and federal requirements.	3.4 ± 0.8	14 (56.0)	11 (44.0)
Works within the school site and district organizational lines of authority.	3.6 ± 0.6	17 (68.0)	8 (32.0)
Competency 1.2: Participates in professional development training and exhibits professional behavior characteristic of a school nutrition manager.			
Knows professional development requirements and sources for meeting the requirements.	3.1 ± 0.7	4 (18.2)	18 (81.8)
Understands the importance of representing SN to others in a professional manner.	3.8 ± 0.4	21 (95.5)	1 (4.50)
Knows the importance of professional standards and training.	3.5 ± 0.5	12 (54.5)	10 (45.5)
Implements and models high professional standards in the SN program.	3.5 ± 0.5	15 (68.2)	7 (31.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 2 continues)

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.2: Participates in professional development training and exhibits professional behavior characteristic of a school nutrition manager.			
Models professional behavior and enforces standards for SN staff.	3.7 ± 0.5	20 (91.0)	2 (9.1)
Develops a plan for Personnel professional development and encourages and assists employees in complying with professional development requirements.	3.4 ± 0.6	8 (36.4)	14 (63.6)
Attends trainings to learn/review menu and meal pattern requirements as appropriate.	3.6 ± 0.6	14 (63.6)	8 (36.4)
Completes food safety certificate program.	3.9 ± 0.3	21 (95.5)	1 (4.50)
Successfully completes training on CPR, Heimlich Maneuver, and/or First Aid, as applicable.	3.0 ± 0.9	9 (40.9)	13 (59.1)
Provides training to employees.	3.5 ± 0.6	11 (50.0) ^c	11 (50.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.3: Conducts training sessions with staff that positively impact foodservice operations and meet local, state, and federal requirements.			
Knows sources for appropriate education and training materials.	3.1 ± 0.7	5 (22.7)	17 (77.3)
Knows methods of adult education to train employees.	2.8 ± 0.7	7 (31.8)	15 (68.2)
Trains employees to understand the purpose and elements of the profit and loss statement.	2.4 ± 0.7 ^d	6 (27.3)	16 (72.7)
Trains employees on the technology utilized in the operation of the SN program, if applicable.	3.4 ± 0.7	7 (31.8)	15 (68.2)
Trains employees in work simplification techniques.	3.3 ± 0.5	13 (59.1)	9 (40.9)
Proficient in use of technology and able to train employees, if applicable.	3.5 ± 0.5	12 (54.5)	10 (45.5)
Employs coaching techniques in conjunction with training to improve employee performance.	3.3 ± 0.5	11 (50.0)	11 (50.0) ^c
Trains cashiers and other staff to recognize reimbursable meals at point-of-service (POS).	3.9 ± 0.3	15 (68.2)	2 (31.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement^dStatement eliminated due to lack of agreement

(Table 2 continues)

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.3: Conducts training sessions with staff that positively impact foodservice operations and meet local, state, and federal requirements.			
Trains employees to utilize the approved system for accurately counting and claiming meals.	3.9 ± 0.5	15 (68.2)	7 (31.8)
Trains employees in district policies and procedures for cash management.	3.7 ± 0.5	15 (68.2)	7 (31.8)
Trains employees to recognize reimbursable meals accurately.	4.0 ± 0.0	16 (72.7)	6 (27.3)
Trains employees in the causes and prevention of foodborne illnesses.	3.8 ± 0.5	17 (77.3)	5 (22.7)
Trains employees on proper procedures to calibrate food thermometers.	3.6 ± 0.5	18 (81.8)	4 (18.2)
Ensures that all employees attend training on Hazard Analysis Critical Control Point (HACCP) principles and understands the importance of time/temperature relationship to food safety.	3.6 ± 0.7	16 (72.7)	6 (27.3)
Trains employees on the proper techniques for lifting.	3.6 ± 0.7	16 (72.7)	6 (27.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 2 continues)

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD)^a	Know/Perform Categories^b	
		When Hired	Advanced
Competency 1.3: Conducts training with staff that positively impact foodservice operations and meet local, state, and federal requirements.			
Trains employees on use, care, and safe operation of equipment.	3.6 ± 0.5	12 (54.5)	10 (45.5)
Trains employees on safety principles, policies, procedures, and guidelines.	3.7 ± 0.5	13 (59.1)	9 (40.9)
Trains employees on energy conservation measures in the school environment.	2.7 ± 0.8	8 (36.4)	14 (63.6)
Trains employees on weighing and measuring ingredients.	3.6 ± 0.6	19 (86.4)	3 (13.6)
Trains employees on which type of extinguisher to use on which type of fire.	3.1 ± 0.8	10 (45.5)	12 (54.5)
Institutes a training process for all kitchen staff on receiving and storing foods properly.	3.4 ± 0.8	13 (59.1)	9 (40.9)
Provides orientation to new staff members regarding job description, including duties and responsibilities for preparing high quality, nutritious food.	3.7 ± 0.5	14 (63.6)	8 (36.4)
Includes on-the-job training in customer service as part of professional standards.	3.4 ± 0.6	14 (63.6)	8 (36.4)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.3: Conducts training with staff that positively impact foodservice operations and meet local, state, and federal requirements.			
Trains staff on an ongoing, regular, and as-needed basis on skills needed to perform effectively and correctly.	3.3 ± 0.7	15 (68.2)	7 (31.8)
Implements a program of cross-training for all employees to increase productivity.	3.2 ± 0.5	8 (36.4)	14 (63.6)
Provides orientation to the SN program and school cafeteria for new employees.	3.4 ± 0.7	14 (63.6)	8 (36.4)
Trains and drills employees on district/school emergency plans.	3.3 ± 0.8	9 (40.9)	13 (59.1)
Trains employees on their role in the crisis/emergency plan.	3.4 ± 0.7	10 (45.5)	12 (54.5)
Trains employees on proper pest control procedures.	3.3 ± 0.8	17 (77.3)	5 (22.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 2 continues)

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.4: Adheres to professional codes of conduct for diverse staff and interpersonal relationships among teachers, principals, other school staff, and students.			
Understands the impact of workplace diversity and the importance of working effectively in a diverse workplace.	3.5 ± 0.5	15 (71.4)	6 (28.6)
Knows district policies on student relations/interpersonal relationships.	3.5 ± 0.6	13 (61.9)	8 (38.1)
Promotes respect and appreciation for the individuals who make up the workforce.	3.6 ± 0.5	20 (95.2)	1 (4.80)
Manages a workplace of diverse employees who have varied experiences and skills.	3.5 ± 0.6	18 (85.7)	3 (14.3)
Competency 1.5: Monitors and evaluates employee performance and morale.			
Knows policies and procedures for evaluating employees.	3.4 ± 0.6	12 (57.1)	9 (42.9)
Understands the importance of employee recognition.	3.3 ± 0.6	16 (76.2)	5 (23.8)
Evaluates employees fairly utilizing the job description according to district procedures.	3.4 ± 0.6	12 (57.1)	9 (42.9)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 2 continues)

*(Table 2 continued)**Functional Area 1: Administration Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.5: Monitors and evaluates employee performance and morale.			
Monitors staff activities to ensure all tasks are completed.	3.5 ± 0.5	17 (81.0)	4 (19.0)
Monitors employees during the food preparation period to ensure the yield of high quality food that meets nutrition guidelines.	3.8 ± 0.4	16 (76.2)	5 (23.8)
Recognizes reimbursable meals and monitors employees during meal service periods.	3.9 ± 0.3	16 (76.2)	5 (23.8)
Ensures that employees know the role of sanitation and personal hygiene in food safety.	3.7 ± 0.7	17 (81.0)	4 (19.0)
Monitors employees' activities to ensure hands are washed correctly and at appropriate times to prevent food contamination.	3.7 ± 0.5	19 (90.5)	2 (9.50)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.5: Monitors and evaluates employee performance and morale.			
Ensures employees follow procedures for proper glove use to prevent contamination of food products.	3.7 ± 0.5	19 (90.5)	2 (9.50)
Monitors and assesses employees' performance on an ongoing basis to assist with determining departmental and individual training needs.	3.3 ± 0.5	9 (42.9)	12 (57.1)
Provides leadership with a focus on employee satisfaction, program improvement, and employee productivity.	3.4 ± 0.7	6 (31.6)	13 (68.4)
Counsels employees on work-related concerns to encourage good employee morale and improve performance.	3.3 ± 0.6	11 (52.4)	10 (47.6)
Acknowledges and recognizes personnel for outstanding work performance and accomplishments.	3.4 ± 0.7	14 (66.7)	7 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 2 continues)

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.6: Provides leadership to the SN staff that promotes team effectiveness and productivity.			
Understands the importance of good leadership skills in managing the SN program.	3.6 ± 0.5	11 (55.0)	9 (45.0)
Knows techniques of time management.	3.4 ± 0.5	16 (80.0)	4 (20.0)
Knows the importance of setting specific, measurable, achievable, relevant, and time-bound (SMART) goals.	2.8 ± 0.7	4 (20.0)	16 (80.0)
Provides fair, consistent, and compassionate leadership in the management of the school nutrition program and employees.	3.6 ± 0.5	11 (55.0)	9 (45.0)
Treats employees and others with respect.	3.8 ± 0.4	18 (90.0)	2 (10.0)
Promotes a team approach among employees to problem-solve and meet program goals.	3.4 ± 0.6	13 (65.0)	7 (35.0)
Encourages employees to incorporate energy saving techniques as a routine part of their work habits.	2.7 ± 0.8	8 (40.0)	12 (60.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.6: Provides leadership to the SN staff that promotes team effectiveness and productivity.			
Demonstrates flexibility and the ability to work effectively in a fast-paced, dynamic work environment.	3.6 ± 0.5	17 (85.0)	3 (15.0)
Demonstrates an open approachable management style.	3.4 ± 0.7	13 (65.0)	7 (35.0)
Considers new ideas and concepts and incorporates new methods where needed for better results.	3.3 ± 0.6	9 (45.0)	11 (55.0)
Supervises employees effectively to ensure SN goals are met.	3.7 ± 0.5	14 (70.0)	6 (30.0)
Relates to employees as a leader and not as a friend.	3.0 ± 0.6	16 (80.0)	4 (20.0)
Ability to plan and execute SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals.	2.9 ± 0.6	5 (25.0)	15 (75.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.7: Communicates with employees in a manner that promotes cooperation and reduces conflicts.			
Knows techniques for dealing with difficult employees.	3.6 ± 0.5	12 (60.0)	8 (40.0)
Knows policies and procedures for handling employee grievances.	3.5 ± 0.6	6 (30.0)	14 (70.0)
Knows district policies and procedures for disciplining employees.	3.6 ± 0.6	7 (35.0)	13 (65.0)
Knows techniques for conflict resolution.	3.0 ± 0.6	6 (30.0)	14 (70.0)
Provides clear direction and communication of job expectations to SN staff.	3.7 ± 0.5	15 (75.0)	5 (25.0)
Keeps employees informed through regular meetings and written and verbal communications.	3.4 ± 0.6	13 (65.0)	7 (35.0)
Uses feedback to improve communication among and with employees.	3.4 ± 0.7	12 (60.0)	8 (40.0)
Actively listens to employees and others to ensure understanding.	3.4 ± 0.6	14 (70.0)	6 (30.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.7: Communicates with employees in a manner that promotes cooperation and reduces conflicts.			
Applies techniques for dealing with difficult employees and seeks added assistance and expertise when needed.	3.5 ± 0.6	7 (35.0)	13 (65.0)
Uses fair, constructive methods to correct employees and to resolve differences.	3.5 ± 0.5	13 (65.0)	7 (35.0)
Applies conflict resolution techniques to resolve problems between and with employees and other key personnel in the school and district.	3.4 ± 0.6	7 (35.0)	13 (65.0)
Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.			
Understands the impact of cross-training employees to increase productivity.	3.3 ± 0.6	5 (31.2)	11 (68.8)
Knows how to organize work areas and job requirements for efficient work flow.	3.3 ± 0.6	11 (68.8)	5 (31.2)
Knows principles of work simplification.	3.2 ± 0.7	8 (50.0) ^c	8 (50.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 2 continues)

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.			
Knows principles of effective delegation.	3.1 ± 0.7	9 (56.3)	7 (43.8)
Knows principles of teamwork and techniques for applying it.	3.3 ± 0.6	10 (62.5)	6 (37.5)
Implements a program of cross-training for all employees to increase productivity.	3.3 ± 0.7	5 (31.3)	11 (68.8)
Assists employees with learning and utilizing time management techniques.	3.3 ± 0.7	4 (25.0)	12 (75.0)
Guides staff to incorporate work simplification techniques into product tasks.	3.1 ± 0.7	7 (43.8)	9 (56.2)
Organizes work flow for efficient and prompt production and customer service.	3.4 ± 0.7	9 (56.2)	7 (43.8)
Assists employees with organizing work areas for efficient work flow and safety.	3.4 ± 0.7	8 (50.0) ^c	8 (50.0)
Schedules equipment use for maximum efficiency.	3.3 ± 0.8	9 (56.2)	7 (43.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 2 continues)

*(Table 2 continued)**Functional Area 1: Personnel Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.			
Evaluates menus for equipment/time requirements and personnel availability.	3.2 ± 0.8	5 (31.2)	11 (68.8)
Sets performance standards for employees.	3.2 ± 0.7	6 (40.0)	9 (60.0)
Utilizes time management techniques to ensure tasks are completed within time constraints.	3.3 ± 0.7	10 (62.5)	6 (37.5)
Schedules all duties fairly for maximum efficiency and employee productivity.	3.4 ± 0.6	7 (43.8)	9 (56.2)
Organizes work flow for safe and efficient production and service.	3.5 ± 0.6	9 (56.2)	7 (43.8)
Plans work organization of staff so that job tasks are performed in proper sequence.	3.3 ± 0.9	9 (56.2)	7 (43.8)
Plans production schedules to effectively utilize resources and coordinate activities of the foodservice staff.	3.4 ± 0.7	7 (43.8)	9 (56.2)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 2 continues)*

(Table 2 continued)

Functional Area 1: Personnel Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.			
Develops employee schedules to ensure maximum use of labor hours.	3.6 ± 0.5	9 (56.2)	7 (43.8)
Maintains staffing appropriate to the required daily needs of the SN program and plans for future demands.	3.4 ± 0.7	4 (25.0)	12 (75.0)
Applies principles of effective delegation to assign tasks, provide growth opportunities, and achieve objective.	3.0 ± 0.9	5 (31.2)	11 (68.8)
Develops and posts employee work schedule regularly.	3.6 ± 0.6	11 (68.8)	5 (31.3)
Encourages employees to take individual responsibility for using sound financial practices in their work duties.	3.1 ± 0.9	8 (50.0) ^c	8 (50.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

Functional Area 2: Sanitation, Safety, and Security.

The Sanitation, Safety, and Security functional area contains three competency statements and 61 knowledge and skill statements (Table 3). All statements had a mean importance rating of 3.1 or greater; therefore, no statements were eliminated, nor did they have equal agreements to determine placement as “when hired” or “advanced,” and are listed in Table 3. Review-panel members identified all 61 statements as knowledge or skills needed when professionals are hired, and none identified statements at the advanced level. The review-panel’s agreement rating for the three competency statements for Sanitation, Safety, and Security showed a rating of 3.1 or greater. Therefore, the panel’s agreement accurately reflects the placement of the three competency, knowledge, and skill statements listed under this functional area (Table 10).

Table 3

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Knows federal, state, and local health code requirements for foodservice establishments.	3.8 ± 0.4	10 (62.5)	6 (37.5)
Knows district/school emergency/crisis management plan and manager’s role in the plan.	3.4 ± 0.5	9 (56.2)	7 (43.8)
Monitors temperatures for receiving, storing, cooling, freezing, thawing, producing, cooking, and serving foods in the SN program.	3.7 ± 0.6	12 (75.0)	4 (25.0)
Follows and enforces all safety regulations and guidelines.	3.7 ± 0.5	13 (81.2)	3 (18.8)
Monitors and enforces rules of health, cleanliness, personal habits, and proper clothing to ensure employees handling food are healthy.	3.7 ± 0.5	14 (87.5)	2 (12.5)
Works with the SN administration to implement sanitation, safety, and security practices consistent with local, state, and federal requirements.	3.8 ± 0.4	12 (75.0)	4 (25.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 3 continues)

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Ensures SN operations meet the health department code, and any deficiencies are corrected promptly.	3.8 ± 0.4	13 (81.2)	3 (18.8)
Posts health department inspection certificate prominently.	3.4 ± 0.7	13 (81.2)	3 (18.8)
Follows district procedures that meet food safety standards for handling, storing, and disposing of garbage and refuse.	3.6 ± 0.6	12 (75.0)	4 (25.0)
Follows district policies and procedures for reporting accidents and incident reports.	3.9 ± 0.3	12 (75.0)	4 (25.0)
Follows school/district crisis or emergency procedures.	3.7 ± 0.5	12 (75.0)	4 (25.0)
Maintains temperature logs according to regulations for checking and recording temperatures of all storage units upon arrival each morning and when leaving in the afternoon.	3.7 ± 0.5	12 (75.0)	4 (25.0)
Follows Department of Health Material Safety Data Sheets (MSDS) when handling cleaning products.	3.5 ± 0.6	13 (81.2)	3 (18.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 3 continues)

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Works with SN administration and other officials to fulfill all federal and state responsibilities for food recalls.	3.8 ± 0.4	11 (68.8)	5 (31.2)
Maintains and implements standard operating procedures to identify and contain products when there is a food recall.	3.8 ± 0.4	13 (81.2)	3 (18.8)
Ensures all employees can operate department fire extinguishers.	3.2 ± 0.8	12 (75.0)	4 (25.0)
Maintains a list of emergency contact telephone numbers.	3.6 ± 0.5	11 (68.8)	5 (31.2)
Models proper lifting techniques.	3.4 ± 0.6	12 (75.0)	4 (25.0)
Knows principles of safety and sanitation for equipment, personnel, food, and foodservice facility.	3.6 ± 0.8	13 (81.2)	3 (18.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 3 continues)

*(Table 3 continued)**Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Knows procedures to prevent cross contamination.	3.8 ± 0.4	13 (81.2)	3 (18.8)
Knows procedures for appropriate handling, storing, and disposing of garbage and refuse.	3.6 ± 0.6	13 (81.2)	3 (18.8)
Knows procedures for preventing contamination of equipment and utensils.	3.8 ± 0.4	12 (75.0)	4 (25.0)
Understands the value of a clean, pleasant dining environment.	3.6 ± 0.5	14 (87.5)	2 (12.5)
Implements and maintains system for preventing contamination of equipment and utensils.	3.6 ± 0.6	13 (81.2)	3 (18.8)
Calibrates food thermometers correctly and regularly to obtain accurate readings.	3.5 ± 0.6	12 (75.0)	4 (25.0)
Implements and monitors a regular cleaning and sanitizing schedule for food preparation areas, food contact surfaces, walls, floors, and equipment.	3.7 ± 0.6	12 (75.0)	4 (25.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 3 continues)*

*(Table 3 continued)**Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Posts current emergency telephone numbers.	3.1 ± 1.0	11 (68.8)	5 (31.2)
Enforces rules of time and appropriate temperatures for food handling and preparation.	3.8 ± 0.4	11 (68.8)	5 (31.2)
Labels and stores chemicals and other hazardous materials separately from food products.	3.8 ± 0.4	14 (87.5)	2 (12.5)
Follows procedures for use of step ladders and other utilities/transport equipment.	3.3 ± 0.9	13 (81.2)	3 (18.8)
Operates fire extinguisher and determines the extinguisher to use on different types of fires.	3.3 ± 0.7	11 (68.8)	5 (31.2)
Implements security measures throughout the SN operation and enforces compliance by all.	3.4 ± 0.7	12 (75.0)	4 (25.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 3 continues)*

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.			
Maintains a safe working environment.	3.8 ± 0.4	13 (81.2)	3 (18.8)
Provides an environment conducive to protecting the health and well-being of customers through high levels sanitation standards.	3.6 ± 0.8	11 (68.8)	5 (31.2)
Follows rules for storing other potentially hazardous materials and cleaning products in a separate area away from food products.	3.6 ± 0.8	12 (75.0)	4 (25.0)
Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.			
Understands causes and prevention of foodborne illness outbreaks.	3.9 ± 0.4	12 (80.0)	3 (20.0)
Knows principles of personal hygiene.	3.8 ± 0.4	15 (100.0)	0 (0.0)
Knows correct method for handwashing.	3.9 ± 0.3	14 (93.3)	1 (6.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 3 continues)

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.			
Knows signs and symptoms of an adverse food reaction and/or an allergic reaction.	3.7 ± 0.5	10 (66.7)	5 (33.3)
Knows procedures for ensuring the safety of foods served to students with food allergies.	3.8 ± 0.4	9 (60.0)	6 (40.0)
Knows procedures for preventing cross-contamination of allergenic foods during storage, preparation, and service.	3.9 ± 0.4	11 (73.3)	4 (26.7)
Knows safe temperatures for receiving, storing, cooling, freezing, thawing, production, cooking, and serving foods in the SN program.	3.7 ± 0.5	12 (80.0)	3 (20.0)
Knows procedures to protect food from deliberate tampering.	3.6 ± 0.8	11 (73.3)	4 (26.7)
Knows procedures to protect the security of personnel/customers in the SN program.	3.5 ± 0.6	11 (73.3)	4 (26.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 3 continues)

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.			
Monitors and enforces employees' adherence to personal hygiene policies and procedures.	3.8 ± 0.4	15 (100.0)	0 (0.0)
Practices principles of good personal hygiene.	3.9 ± 0.4	14 (93.3)	1 (6.7)
Provides proper equipment, utensils, and training to prevent cuts and burns.	3.7 ± 0.6	12 (80.0)	3 (20.0)
Evaluates site routinely to ensure aisles, floors, and walkways are clear and in good repair to prevent trips and falls.	3.7 ± 0.5	13 (86.7)	2 (13.3)
Utilizes appropriate technology in safeguarding the safety of employees and the food served to students.	3.3 ± 1.0	12 (80.0)	3 (20.0)
Implements procedures for holding food at the correct temperature during serving periods.	3.9 ± 0.4	13 (86.7)	2 (13.3)
Implements a system for documentation of food temperatures during serving periods.	3.7 ± 0.5	11 (73.3)	4 (26.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 3 continues)

(Table 3 continued)

Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.			
Maintains daily temperature records for storage areas, refrigeration/freezer equipment, and dishwashing equipment.	3.7 ± 0.5	12 (80.0)	3 (20.0)
Ensures that corrective action for deviations from required temperatures are implemented and recorded promptly.	3.7 ± 0.5	13 (86.7)	2 (13.3)
Maintains cleaning procedures to ensure storage areas are clean, dry, and free from infestation at all times.	3.7 ± 0.5	15 (100.0)	0 (0.0)
Prohibits entry of unauthorized individuals in the food preparation, receiving, and storage areas.	3.4 ± 0.8	13 (86.7)	2 (13.3)
Competency 2.3: Understands and implements Hazard Analysis and Critical Control Points (HACCP) and food safety practices in the SN program.			
Knows the Hazard Analysis and Critical Control Points (HACCP)-based food safety plan for the SN program.	3.5 ± 0.9	10 (71.4)	4 (28.6)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 3 continues)

*(Table 3 continued)**Functional Area 2: Sanitation, Safety, and Security Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 2.3: Understands and implements Hazard Analysis and Critical Control Points (HACCP) and food safety practices in the SN program.			
Knows procedures to eliminate hazards and minimize risks of foodborne illnesses.	3.9 ± 0.3	13 (92.9)	1 (7.1)
Implements and incorporates (Hazard Analysis and Critical Control Points) HACCP principles into the management of the SN program-based food safety plan.	3.7 ± 0.5	12 (85.7)	2 (14.3)
Reports safety hazards immediately and ensures hazards are removed or corrected.	3.7 ± 0.5	14 (100.0)	0 (0.0)
Implements a system for following (Hazard Analysis and Critical Control Points) HACCP rules for safety and sanitation when storing food.	3.6 ± 0.5	11 (78.6)	3 (21.4)
Ensures controls are in place to store and maintain all foods at appropriate temperatures.	3.8 ± 0.4	12 (85.7)	2 (14.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

Functional Area 3: Facility and Property Management.

The Facility and Property Management functional area contains four competency statements and 34 knowledge and skill statements. These statements may be found in Table 4. All statements had a mean importance rating of 2.5 or greater.

Review-panel members identified 21 statements as knowledge or skills needed when professionals are hired. There was one statement that had equal agreement as an important skill statement at the “when hired” and the “advanced” level, “Follows district policies and procedures for equipment repair and replacement” (50.0% “when hired” and 50.0% “advanced”). Researchers elected to make the final decision that the statement, “Follows district policies and procedures for equipment and replacement,” was an important skill for SN managers to have at the “advanced” level. There were 13 knowledge and skill statements in the Facility and Property Management functional area identified by review-panel members as necessary for SN managers at “advanced” levels.

The review panel’s agreement rating for Facility and Property Management showed a rating of 2.9 or greater for the four competency statements. Therefore, the panel agreed the competencies accurately reflect the knowledge and skills listed under this functional area. This information may be found in Table 10.

Table 4

Functional Area 3: Facility and Property Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 3.1: Understands and follows policies and procedures that promote and protect facility/property functions, and services.			
Knows all applicable federal, state, and local regulations relating to facility and property.	3.1 ± 0.9	6 (42.9)	8 (57.1)
Knows how to work with administrators to implement facility and property management practices consistent with local, state, and federal requirements.	3.6 ± 0.6	8 (57.1)	6 (42.9)
Knows health department inspection standards.	3.7 ± 0.8	11 (78.6)	3 (21.4)
Knows how to identify facility and property deficiencies and implement corrective action promptly.	3.2 ± 0.8	8 (57.1)	6 (42.9)
Works with SN administration to implement facility and property management practices consistent with local, state, and federal requirements.	3.5 ± 0.7	5 (35.7)	9 (64.3)
Ensures facility and equipment meet health department inspection standards and corrects any deficiencies needed.	3.7 ± 0.6	8 (57.1)	6 (42.9)
Follows district policies and procedures for equipment repair and replacement.	3.5 ± 0.7	7 (50.0)	7 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cDetermined placement of knowledge/skill statement

(Table 4 continues)

(Table 4 continued)

Functional Area 3: Facility and Property Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 3.2: Follows district policies related to equipment operation, safety, and maintenance practices.			
Knows who to contact in the event of emergency repairs to the facility and equipment.	3.6 ± 0.5	8 (57.1)	6 (42.9)
Knows district’s policy on the uses of equipment by outside entities.	3.5 ± 0.7	8 (57.1)	6 (42.9)
Knows district policies and procedures for equipment replacement.	3.2 ± 0.8	3 (21.4)	11 (78.6)
Maintains a current list of contacts and telephone numbers for emergency repairs to the facility and equipment.	3.3 ± 0.8	8 (57.1)	6 (42.9)
Implements a system of security measures to prevent loss, theft, and pilferage.	3.5 ± 0.9	9 (64.3)	5 (35.7)
Inspects the SN facility for safety hazards.	3.6 ± 0.6	11 (78.6)	3 (21.4)
Monitors temperature logs of refrigeration/freezer equipment twice a day to ensure proper operation.	3.6 ± 0.5	9 (69.2)	4 (30.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 4 continues)

(Table 4 continued)

Functional Area 3: Facility and Property Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 3.3: Uses preventive maintenance and equipment management practices to create a safe work environment.			
Knows how to access manufacturers' directions for equipment use, cleaning, and maintenance.	3.2 ± 0.8	7 (53.8)	6 (46.2)
Knows how to develop and implement a master cleaning schedule for the SN facility and all equipment.	3.2 ± 0.8	7 (53.8)	6 (46.2)
Knows how to inspect the SN facility and equipment daily to ensure cleanliness and safe working condition.	3.5 ± 0.5	8 (61.5)	5 (38.5)
Implements a preventive maintenance program for the SN facility and equipment.	3.2 ± 0.7	5 (38.5)	8 (61.5)
Maintains records of equipment maintenance and repair according to recommended equipment manual/guidelines.	3.0 ± 0.8	6 (46.2)	7 (53.8)
Follows manufacturers' directions for equipment use, cleaning, and maintenance.	3.5 ± 0.7	9 (69.2)	4 (30.8)
Recommends new equipment purchases to district administrator.	3.0 ± 1.0	5 (38.5)	8 (61.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 4 continues)

*(Table 4 continued)**Functional Area 3: Facility and Property Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 3.3: Uses preventive maintenance and equipment management practices to create a safe work environment.			
Develops an equipment replacement plan.	2.5 ± 1.2	3 (23.1)	10 (76.9)
Develops and implements a cleaning schedule for the kitchen, and the dining areas are always clean.	3.0 ± 1.1	10 (76.9)	3 (23.1)
Works with custodians to make sure dining areas are always clean.	3.0 ± 1.1	11 (84.6)	2 (15.4)
Develops, implements, and monitors the master cleaning schedule for the SN facility and all equipment.	3.3 ± 0.8	9 (69.2)	4 (30.8)
Follows district policies and procedures for pest control in the SN facility.	3.5 ± 0.9	10 (76.9)	3 (23.1)
Inspects facility and equipment daily to ensure cleanliness and proper working condition.	3.4 ± 0.8	9 (69.2)	4 (30.8)
Maintains a good working relationship with the school maintenance department.	3.5 ± 0.7	10 (76.9)	3 (23.1)
Ensures all fire extinguishers are workable and inspections are up to date.	3.2 ± 1.0	8 (61.5)	5 (38.5)
Maintains operation of all school nutrition equipment.	3.2 ± 1.1	4 (33.3)	8 (66.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 4 continues)*

(Table 4 continued)

Functional Area 3: Facility and Property Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 3.4: Implements energy and resource conservation practices for managing equipment and the SN facility.			
Understands energy conservation measures in managing the school nutrition facility and equipment.	2.9 ± 0.9	4 (30.8)	9 (69.2)
Applies energy conservation practices in managing the SN facility and equipment.	2.9 ± 0.8	6 (46.2)	7 (53.8)
Knows available recycling programs, as applicable.	2.6 ± 0.8	4 (30.8)	9 (69.2)
Participates in available recycling programs, as applicable.	2.7 ± 0.8	5 (38.5)	8 (61.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

Functional Area 4: Marketing, Communication, and Customer Service.

The Marketing, Communication, and Customer Service functional area contains four competency statements and 56 knowledge and skill statements (Table 5). All statements had a mean importance rating of 2.6 or greater except for one statement. Review-panel members identified 36 statements as knowledge or skills needed when professionals are hired. There were 20 knowledge and skill statements in the Marketing, Communication, and Customer Service functional area identified by review-panel members as necessary for SN managers at “advanced” levels.

One statement under the Marketing, Communication, and Customer Service functional area, while accepted by the review panel as necessary for SN managers, was deemed convoluted by the researcher. This statement is recorded as, “Knows the importance of marketing SN programs and how to increase awareness of the program’s benefits.” However, for the purposes of clarity, the researchers divided it into two statements for the resource tool: “Knows the importance of marketing school nutrition programs,” and “Knows how to increase awareness of the SN program’s benefits.” This change is reflected in the resource under competency 4, with the statements listed as “advanced” skills, which results in four competencies, 13 knowledge statements, and 44 skill statements (Table 5).

The review panel’s agreement rating for Marketing, Communication, and Customer Service showed a rating of 3.2 or greater. This indicates panel’s agreement that the competencies accurately reflect the knowledge and skills listed under this functional area. This information may be found in Table 10.

Table 5

*Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.1: Promotes a school environment that fosters positive social interaction and promote healthy eating behaviors.			
Knows the importance of marketing SN programs and how to increase awareness of the programs' benefits. ^c	3.2 ± 0.7	5 (38.5)	8 (61.5)
Uses established marketing techniques to improve customer awareness of the program.	3.1 ± 0.5	7 (53.8)	6 (46.2)
Uses marketing to encourage healthy food choices.	3.3 ± 0.6	5 (38.5)	8 (61.5)
Knows how to develop a school site marketing plan to increase participation in the school meals program.	2.7 ± 0.8	4 (30.8)	9 (69.2)
Creates promotional activities that motivate and support student well-being.	2.8 ± 0.9	6 (46.2)	7 (53.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cThe statement was divided into two knowledge statements which were identified as necessary for SN managers at an "advanced level."

(Table 5 continues)

*(Table 5 continued)**Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD)^a	Know/Perform Categories^b	
		When Hired	Advanced
Competency 4.1: Promotes a school environment that fosters positive social interaction and promote healthy eating behaviors.			
Uses school menus as a marketing tool.	3.2 ± 0.8	9 (69.2)	4 (30.8)
Implements school district marketing plan at the school site when appropriate.	3.2 ± 0.8	7 (53.8)	6 (46.2)
Implements the school district's plans to promote special events.	3.2 ± 0.8	8 (61.5)	5 (38.5)
Maintains a copy of the current local school wellness policy as appropriate.	3.5 ± 0.9	9 (69.2)	4 (30.8)
Communicates with school officials regarding requests from staff for menus planned around special school occasions.	3.4 ± 0.9	7 (53.8)	6 (46.2)
Collaborates with other departments and individuals at the school site and within the district, as appropriate.	3.2 ± 0.7	6 (46.2)	7 (53.8)
Works with the SN administration to implement a marketing plan for the SN program to create an atmosphere that attracts all potential customers including students, teachers, administrators, and other support staff.	3.4 ± 0.7	4 (30.8)	9 (69.2)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 5 continues)*

*(Table 5 continued)**Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.1: Promotes a school environment that fosters positive social interaction and promote healthy eating behaviors.			
Promotes the SN program to students, staff, parents, and the community.	3.4 ± 0.5	9 (69.2)	4 (30.8)
Knows how to use technology to promote nutritious school meals, when applicable.	2.9 ± 0.8	4 (30.8)	9 (69.2)
Utilizes available technology for marketing and communication of SN programs.	2.7 ± 0.6	4 (30.8)	9 (69.2)
Knows SN regulations regarding signage.	3.5 ± 0.8	9 (69.2)	4 (30.8)
Displays signage to identify what foods constitute a unit-priced reimbursable meal at the beginning of the serving line when Offer-versus-Serve (OVS) is implemented.	3.6 ± 0.5	9 (69.2)	4 (30.8)
Competency 4.2: Develops and implements best practices for providing and maintaining a quality dining experience.			
Knows how to establish a customer-friendly and responsive environment in the SN program.	3.4 ± 0.5	7 (53.8)	6 (46.2)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 5 continues)*

*(Table 5 continued)**Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.2: Develops and implements best practices for providing and maintaining a quality dining experience.			
Provides a SN environment that projects a positive message about the meals served and their nutritional value.	3.3 ± 0.6	10 (76.9)	3 (23.1)
Uses merchandising techniques to improve customer nutrition choices and practices.	3.2 ± 0.7	5 (38.5)	8 (61.5)
Assists the school community in hosting special events that feature school cafeteria, if applicable.	3.1 ± 1.0	6 (46.2)	7 (53.8)
Coordinates facilities and services with outside groups when authorized by school officials.	3.0 ± 0.8	7 (53.8)	6 (46.2)
Knows the importance of creating a student-friendly environment with healthy food, clean serving lines, and helpful employees to improve participation in the SN program.	3.5 ± 0.5	9 (69.2)	4 (30.8)
Maintains an attractive dining area, decorated appropriately.	3.2 ± 0.8	9 (69.2)	4 (30.8)
Recommends improvements for the dining environment to encourage student participation.	3.2 ± 0.6	6 (46.2)	7 (53.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 5 continues)*

*(Table 5 continued)**Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD)^a	Know/Perform Categories^b	
		When Hired	Advanced
Competency 4.3: Implements customer service techniques to promote customer satisfaction.			
Knows customer expectations for the SN program at the school level site.	3.2 ± 0.7	7 (53.8)	6 (46.2)
Meets and exceeds customer expectations for the school site's nutrition program.	3.2 ± 0.7	10 (76.9)	3 (23.1)
Knows key factors that contribute to customer satisfaction of students who participate or could participate in the SN program.	3.2 ± 0.7	6 (46.2)	7 (53.8)
Trains staff to remain alert to factors that affect customer satisfaction.	3.2 ± 0.6	7 (53.8)	6 (46.2)
Encourages SN staff to be helpful and supportive of student customers.	3.2 ± 0.6	10 (76.9)	3 (23.1)
Responds immediately to customers' and parents' complaints and works to resolve issues.	3.5 ± 0.5	12 (92.3)	1 (7.7)
Organizes work flow for efficient and prompt production and customer service.	3.4 ± 0.7	9 (69.2)	4 (30.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 5 continues)*

*(Table 5 continued)**Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.3: Implements customer service techniques to promote customer satisfaction.			
Involves school administrators and faculty in promoting special school events such as grandparent's day, contests, and theme days as a part of marketing and customer service efforts.	3.2 ± 0.7	8 (61.5)	5 (38.5)
Knows the importance of collecting data on customer acceptability of school menus.	2.8 ± 0.8	6 (46.2)	7 (53.8)
Collects students' and other customers' comments and services about the SN program.	3.1 ± 0.8	6 (46.2)	7 (53.8)
Knows the importance of providing excellent customer service.	3.7 ± 0.5	12 (92.3)	1 (7.7)
Serves as a model for customer-service oriented SN staff.	3.5 ± 0.5	11 (84.6)	2 (15.4)
Demonstrates professionalism in working with SN program customers.	3.5 ± 0.8	11 (84.6)	2 (15.4)
Serves as a role model to other SN staff to help create a customer-friendly environment.	3.6 ± 0.5	12 (92.3)	1 (7.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 5 continues)*

(Table 5 continued)

*Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.3: Implements customer service techniques to promote customer satisfaction.			
Responds to customer suggestions and comments in a pleasant and positive manner.	3.4 ± 0.7	11 (84.6)	2 (15.4)
Uses nutrition education materials in the cafeteria and on the serving line to promote an awareness of healthy school meals.	3.2 ± 0.6	5 (38.5)	8 (61.5)
Develops a process to get feedback from customers about their preferences and expectations.	3.0 ± 0.9	7 (53.8)	6 (46.2)
Discusses ways to improve customer satisfaction with other staff members.	3.2 ± 0.7	7 (53.8)	6 (46.2)
Competency 4.4: Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.			
Knows the importance of proper nutrition and the nutrition environment as an integral part of educating children.	3.2 ± 0.6	8 (61.5)	5 (38.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 5 continues)

(Table 5 continued)

*Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.4: Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.			
Encourages students to make wise food choices that result in healthy, well-balanced meals.	3.4 ± 0.5	9 (69.2)	4 (30.8)
Provides menu maker with students' comments regarding menu item likes and dislikes, new food items served, and menu changes.	3.3 ± 0.9	9 (69.2)	4 (30.8)
Encourages customers to select a variety of foods.	3.3 ± 0.8	11 (84.6)	2 (15.4)
Knows the importance of working with school principal and faculty.	3.6 ± 0.5	10 (76.9)	3 (23.1)
Works with school district and officials to provide daily/monthly menus to students, if applicable.	3.4 ± 0.8	8 (66.7)	4 (33.3)
Shares nutritional information with students, parents, and faculty about nutrient content of food served in the school meals.	2.8 ± 0.8	6 (46.2)	7 (53.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 5 continues)

(Table 5 continued)

*Functional Area 4: Marketing, Communication, and Customer Service
Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 4.4: Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.			
Communicates with customers to determine what influences their eating habits.	3.0 ± 0.6	6 (46.2)	7 (53.8)
Presents pertinent SN information, when appropriate, at school or community meetings.	2.9 ± 0.9	5 (38.5)	8 (61.5)
Communicates effectively with employees, supervisors, school administration, parents, students, other school employees, and the public as appropriate.	3.5 ± 0.5	10 (76.9)	3 (23.1)
Works with stakeholders to generate support for federal, state, and local policies beneficial to the health and education of children.	2.6 ± 0.7	3 (23.1)	10 (76.9)
Assists teachers, school administrators, and parents with nutrition education resources.	2.7 ± 1.0	5 (38.5)	8 (61.5)
Communicates the school district policy for fundraising.	2.7 ± 1.0	8 (61.5)	5 (38.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

Functional Area 5: Procurement and Inventory Management.

The Procurement and Inventory Management functional area contains five competency statements and 45 knowledge and skill statements (Table 6). All statements had a mean importance rating of 3.1 or greater. Review-panel members identified 34 statements as knowledge or skills needed when professionals are hired, and 11 statements at the “advanced” level.

There were four knowledge and skill statements that received equal approval for SN managers for “when hired” and at an “advanced” level. Researchers made the final decision to place all four knowledge and skill statements at the “advanced” level, which is displayed in Table 6. The four statements are listed below:

- “Knows policies and procedures for the use of USDA Foods” was placed under competency 5.3;
- “Knows effective inventory procedures for managing the flow of products from storage to the serving line” was placed under competency 5.5;
- “Implements effective use of district technology when conducting/tracking inventory, if applicable” was placed under competency 5.5; and
- “Follows district guidelines for maintaining food and supply items in inventory to be available for use in case of an emergency” was placed under competency 5.5.

The review panel’s agreement rating for Procurement and Inventory Management showed a rating of 3.4 or greater. This indicates the panel’s agreement that the competencies accurately reflect the knowledge and skills listed under this functional area. This information may be viewed in Table 10.

Table 6

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.1: Utilizes forecasting methods to ensure adequate quantities of food are purchased.			
Knows forecasting methods to order accurate amounts of food and supplies.	3.6 ± 0.5	10 (83.3)	2 (16.7)
Utilizes effective forecasting methods to determine the amount of food and supplies to order.	3.5 ± 0.5	8 (66.7)	4 (33.3)
Utilizes production records as a source of information for past and current usage of food and supplies.	3.6 ± 0.5	8 (66.7)	4 (33.3)
Plans for and utilizes leftovers when forecasting amounts of food and supplies to order.	3.6 ± 0.5	7 (58.3)	5 (41.7)
Competency 5.2: Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.			
Knows the managers' responsibilities for ordering, receiving, storing, and conducting inventory of products for the SN program.	3.6 ± 0.7	5 (41.7)	7 (58.3)
Uses historical data and standardized recipes to determine amount of food to order.	3.5 ± 0.5	7 (58.3)	5 (41.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 6 continues)

(Table 6 continued)

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.2: Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.			
Uses standardized recipes to calculate amount of food to order for the schools and prepare menu items.	3.5 ± 0.5	9 (75.0)	3 (25.0)
Knows the federal, state, and local school purchasing guidelines.	3.3 ± 0.9	4 (33.3)	8 (66.7)
Uses product descriptions when ordering food to ensure the correct menu items are ordered and received.	3.4 ± 0.7	7 (58.3)	5 (41.7)
Works with SN administration to implement procurement practices consistent with local, state, and federal requirements.	3.6 ± 0.7	5 (41.7)	7 (58.3)
Participates in the district's product screening and brand approval activities, as appropriate.	3.3 ± 0.8	7 (58.3)	5 (41.7)
Communicates with SN administration regarding approved product list to ensure correct product is ordered based on contract terms.	3.5 ± 0.5	9 (75.0)	3 (25.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 6 continues)

(Table 6 continued)

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.2: Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.			
Knows how to use the Food Buying Guide and other credible resources to determine the quantity of food to order.	3.5 ± 0.8	5 (41.7)	7 (58.3)
Utilizes product specifications for case/serving size when calculating amounts to order.	3.5 ± 0.7	7 (58.3)	5 (41.7)
Knows the importance of checking inventory before ordering.	3.8 ± 0.5	11 (91.7)	1 (8.3)
Competency 5.3: Follows approved federal, state, and local regulations for utilizing and serving USDA Foods.			
Knows policies and procedures for the use of USDA Foods.	3.5 ± 0.5	6 (50.0)	6 (50.0) ^c
Utilizes inventory when determining quantities for purchased food and/or USDA Foods.	3.4 ± 0.5	5 (41.7)	7 (58.3)
Follows approved federal, state, and local guidelines for conducting an inventory of purchased food and USDA Foods.	3.4 ± 0.5	7 (58.3)	5 (41.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 6 continues)

(Table 6 continued)

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.4: Follows proper procedures for receiving food and supplies.			
Knows policies and procedures for receiving and accepting products delivered to the SN program.	3.6 ± 0.5	9 (81.8)	2 (18.2)
Knows the importance of checking prices and price extensions to verify accuracy of invoice.	3.5 ± 0.5	8 (72.7)	3 (27.3)
Trains employees to understand the value of accurate and complete specifications to ensure that products are delivered and received correctly and as specified.	3.3 ± 0.6	6 (54.5)	5 (45.5)
Follows district procedures for receiving products to verify that quantities, prices, and specified items conform to the order placed.	3.5 ± 0.5	7 (63.6)	4 (36.4)
Follows procedures for inspecting merchandise for damage, signs of contamination, and/or improper temperature upon delivery.	3.6 ± 0.5	10 (90.9)	1 (9.1)
Follows district procedures for returning and crediting unacceptable product.	3.4 ± 0.5	8 (72.7)	3 (27.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 6 continues)

*(Table 6 continued)**Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.4: Follows proper procedures for receiving food and supplies.			
Verifies no unauthorized substitutions are delivered.	3.5 ± 0.5	8 (72.7)	3 (27.3)
Follows school district policies and procedures for documenting variations between purchase order and invoice/delivery ticket.	3.5 ± 0.5	9 (81.8)	2 (18.2)
Retains a copy of the order form and invoice at the product check-in point to verify products delivered are the products ordered.	3.3 ± 0.6	8 (72.7)	3 (27.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 6 continues)*

(Table 6 continued)

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.5: Follows procedures to ensure that appropriate storage and issuing techniques are implemented.			
Knows the importance of secure, efficient, and safe storage areas.	3.6 ± 0.5	10 (83.3)	2 (16.7)
Knows procedures for securing storage areas from theft and food tampering.	3.7 ± 0.5	10 (83.3)	2 (16.7)
Develops and implements a system for placing items in the storage areas.	3.3 ± 0.7	8 (66.7)	4 (33.3)
Ensures all food products are dated when entered into storage and/or inventory software.	3.7 ± 0.5	9 (75.0)	3 (25.0)
Monitors use of storeroom space and ensures adequate ventilation and lighting.	3.5 ± 0.5	7 (58.3)	5 (41.7)
Knows district Standard Operating Procedures (SOP) for dating and using products to reflect First-in; First-Out (FIFO).	3.6 ± 0.5	8 (66.7)	4 (33.3)
Knows importance of maintaining an accurate record of products used.	3.3 ± 0.7	7 (58.3)	5 (41.7)
Knows effective inventory procedures for managing the flow of products from storage to the serving line.	3.3 ± 1.0	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 6 continues)

(Table 6 continued)

Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.5: Follows procedures to ensure that appropriate storage and issuing techniques are implemented.			
Knows physical and perpetual methods of recording food products and supplies in inventory and when to use each method.	3.2 ± 0.9	3 (25.0)	9 (75.0)
Knows how and when to delegate responsibility for inventorying to staff members.	3.1 ± 0.8	7 (58.3)	5 (41.7)
Knows the importance of rotating stock when issuing food from the storage areas.	3.6 ± 0.5	10 (83.3)	2 (16.7)
Maintains the school's written policies for procedures established to transfer food in case of equipment failure or natural disaster.	3.3 ± 0.9	5 (41.7)	7 (58.3)
Follows best practices when taking physical inventory, (i.e. one person counts and another person records).	3.5 ± 0.5	10 (83.3)	2 (16.7)
Ensures consistency in inventory practices such as tracking units or cases.	3.6 ± 0.5	8 (66.7)	4 (33.3)
Implements effective use of district technology when conducting/tracking inventory, if applicable.	3.3 ± 0.7	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 6 continues)

*(Table 6 continued)**Functional Area 5: Procurement and Inventory Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 5.5: Follows procedures to ensure that appropriate storage and issuing techniques are implemented.			
Implements a stock rotation system such as First-In, First-Out (FIFO) in accordance with district policies and procedures.	3.6 ± 0.5	11 (91.7)	1 (8.3)
Ensures an adequate inventory is available for all meal services and extra food sales.	3.6 ± 0.5	10 (83.3)	2 (16.7)
Follows district guidelines for maintaining food and supply items in inventory to be available for use in case of an emergency.	3.3 ± 0.6	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

Functional Area 6: Nutrition and Meal Management.

The Nutrition and Meal Management functional area contains three competency statements and 41 knowledge statements skill statements (Table 7). All statements had a mean importance rating of 3.0 or greater. Review-panel members identified 17 statements as knowledge or skills needed when professionals are hired, and 24 knowledge and skill statements necessary for SN managers at the “advanced” level.

There were 15 knowledge and skill statements under the Nutrition and Meal Management functional area that received equal approval from SN managers for “when hired” and at “advanced” levels. Researchers made the final decision for where to place the statements, and these decisions are displayed in Table 7. Nine knowledge (n=5) and skill (n=4) statements were declared at the “advanced” level under competency 6.1. The five knowledge statements are listed below:

- “Knows current USDA standards and regulations that apply to all meals served in the SN program;”
- “Knows federal, state, and local rules governing competitive food sales;”
- “Knows USDA guidelines for making substitutes in the planned menu, if necessary;”
- “Knows the meal pattern requirements for various age/grade groups;” and
- “Knows federal, state, and local policies and procedures regarding meal substitutions.”

The four skill statements at the “advanced” level under this competency are the following:

- “Ensures use of nutritionally-equivalent foods when menu substitutions are necessary;”
- “Adjusts forecasted needs for meals to address special situations;”

- “Implements federal, state, and local regulations regarding competitive foods;” and
- “Utilizes USDA guidelines for making menu substitutions, when necessary.”

The remaining six knowledge (n=3) and skill (n=3) statements identified as necessary when hired and at the advanced level with equal agreement were under competency 6.3. The three “advanced” level knowledge statements selected follow below:

- “Knows the sources of guidance for and importance of a team approach for addressing general food and nutrition needs of all children and children with special dietary needs;”
- “Knows how to follow a medical authorization to modify meals for a child with special needs;” and
- “Knows district policies and procedures for serving children with special needs.”

The three skill statements selected were the following:

- “Ensures applicable policies are followed when providing school meals for children with special needs” was identified as necessary “when hired;”
- “Implements district policies and procedures for ensuring that students with food allergies/special needs are managed correctly” was also recognized as important “when hired;” and
- “Works with health professionals in providing meals to students with special dietary needs” was placed under the “advanced” level of competency 6.3.

The review panel recommended that competency 6.4 be eliminated, and the related knowledge and skill statements be moved to other competencies within the Nutrition and Meal Management functional area. This competency was eliminated by researchers, because the competency statement was deemed similar to other competencies and contained statements

which were like other verified knowledge and skills statements. Researchers agreed to move the following statements, and they are listed in Table 7:

- “Knows how to use Child Nutrition (CN) labels or product formulation statements for crediting food items, if applicable” was identified as “advanced,” and listed under competency 6.1.
- “Ensures the minimum quantities of food components/items are offered daily as a part of the SN program” was identified as “when hired,” and listed under competency 6.2.
- “Knows the minimum quantities of food components/items to offer daily” was identified as needed by SN managers “when hired,” and listed under competency 6.2.
- “Knows USDA requirements for recording food item contributions” was added, and identified as needed at the “advanced” level under competency 6.2.

The remaining three statements from competency 6.4, were added to functional area seven - Financial Management and Accountability. These statements were placed under competency 7.1 as “advanced” skill statements in Table 8 and are listed below:

- “Maintains Child Nutrition (CN) labels or Product Formulation Statements for items that cannot be credited using the Food Buying Guide, as applicable;”
- “Maintains documentation, if applicable, that shows families are informed about the availability of reimbursable meals served under the National School Breakfast Program (NSBP) and National School Lunch Program (NSLP);” and
- “Ensures crediting documentation is complete for all meal components/food items, as applicable.”

The review panel’s agreement rating for Nutrition and Meal Management showed a rating of

3.2 or greater. The panel's agreement accurately reflects competencies for the knowledge and skills listed under this functional area. This information is available in Table 10.

Table 7

Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.1: Ensures all meals in the SN program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.			
Knows responsibilities of the SN manager in implementing nutrition standards.	3.8 ± 0.5	7 (58.3)	5 (41.7)
Knows current USDA standards and regulations that apply to all meals served in the SN program.	3.8 ± 0.4	6 (50.0)	6 (50.0) ^c
Knows laws and regulations for compliance with nutrition objectives in school meals.	3.6 ± 0.5	5 (41.7)	7 (58.3)
Knows local wellness policy requirements related to food and nutrition.	3.6 ± 0.7	5 (41.7)	7 (58.3)
Knows federal, state, and local rules governing competitive food sales.	3.7 ± 0.5	6 (50.0)	6 (50.0) ^c
Knows the importance of using standardized recipes to ensure nutritional requirements are met.	3.7 ± 0.5	8 (66.7)	4 (33.3)
Knows how to use Child Nutrition (CN) Labels or product formulations statements for crediting food items, if applicable.	3.3 ± 0.8	4 (33.3)	8 (66.7) ^d

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cDetermined placement of knowledge/skill statement

^dStatement moved from competency 6.4

(Table 7 continues)

(Table 7 continued)

Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.1: Ensures all meals in the SN program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.			
Knows USDA guidelines for making substitutions in the planned menu, if necessary.	3.6 ± 0.5	6 (50.0)	6 (50.0) ^c
Knows the role of forecasting in controlling under- and over-production.	3.6 ± 0.5	5 (41.7)	7 (58.3)
Knows the meal pattern requirements for various age/grade groups.	4.0 ± 0.0	6 (50.0)	6 (50.0) ^c
Knows the importance of adjusting forecast of meals to prepare in special situations such as weather conditions or field trips.	3.5 ± 0.5	5 (41.7)	7 (58.3)
Ensures use of nutritionally equivalent foods when menu substitutions are necessary.	3.5 ± 0.5	6 (50.0)	6 (50.0) ^c
Adjusts forecasted needs for meals to address special situations.	3.4 ± 0.7	6 (50.0)	6 (50.0) ^c
Implements menu offerings to ensure compliance with USDA regulations.	3.9 ± 0.4	8 (66.7)	4 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 7 continues)

(Table 7 continued)

Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.1: Ensures all meals in the SN program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.			
Ensures all meals served meet nutritional requirements for reimbursement.	4.0 ± 0.3	1 (8.3)	11 (91.7)
Implements current local, state, and federal standards and regulations that meet SN program requirements.	3.7 ± 0.5	5 (41.7)	7 (58.3)
Implements best practices to meet wellness policy requirements related to food and nutrition.	3.3 ± 0.7	4 (33.3)	8 (66.7)
Follows district guidance in using cycle menus, if applicable.	3.1 ± 0.7	8 (66.7)	4 (33.3)
Maximizes use of technology to improve menu management, as applicable.	3.0 ± 0.7	2 (16.7)	10 (83.3)
Implements federal, state, and local regulations regarding competitive foods.	3.6 ± 0.5	6 (50.0)	6 (50.0) ^c
Utilizes standard recipes to ensure nutritional requirements are met.	3.8 ± 0.5	8 (66.7)	4 (33.3)
Utilizes USDA guidelines for making menu substitutions when necessary.	3.6 ± 0.5	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cDetermined placement of knowledge/skill statement

(Table 7 continues)

*(Table 7 continued)**Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.1: Ensures all meals in the SN program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.			
Knows federal, state, and local policies and procedures regarding meal substitutions.	3.7 ± 0.5	6 (50.0)	6 (50.0) ^c
Maintains documentation to support the Smart Snacks requirements for all items sold by the SN program.	3.6 ± 0.8	7 (58.3)	5 (41.7)
Maintains documentation of all non-program food sold.	3.8 ± 0.4	7 (58.3)	5 (41.7)
Competency 6.2: Follows school nutrition program guidelines for serving and offering meal components to students.			
Knows locations of resources to assist school staff in identifying and serving reimbursable meals.	3.3 ± 0.6	5 (41.7)	7 (58.3)
Knows appropriate portion sizes that meet meal pattern requirements.	4.0 ± 0.0	8 (66.7)	4 (33.3)
Knows regulations for implementing offer-versus-serve (OVS) in SN programs.	3.6 ± 0.5	8 (66.7)	4 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement*(Table 7 continues)*

(Table 7 continued)

Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.2: Follows school nutrition program guidelines for serving and offering meal components to students.			
Follows guidelines for implementing SN program meal patterns.	3.7 ± 0.5	8 (66.7)	4 (33.3)
Ensures students are offered all three required food components in at least the minimum required amounts at breakfast.	3.8 ± 0.4	9 (75.0)	3 (25.0)
Ensures students are offered all five required food components in at least the minimum required amounts at lunch.	3.8 ± 0.4	9 (75.0)	3 (25.0)
Monitors access to drinking water in the school cafeteria.	3.4 ± 0.8	8 (66.7)	4 (33.3)
Ensures the minimum quantities of food components/items are offered daily as a part of the SN program.	3.8 ± 0.5	8 (66.7) ^c	4 (33.3)
Knows the minimum quantities of food components/items to offer daily.	3.8 ± 0.4	7 (58.3) ^c	5 (41.7)
Knows USDA requirements for recording food item contributions.	3.6 ± 0.7	5 (41.7) ^c	7 (58.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cStatement moved from competency 6.4

(Table 7 continues)

(Table 7 continued)

Functional Area 6: Nutrition and Meal Management Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 6.3: Follows federal, state, and local guidelines and regulations for addressing special dietary needs in the SN program.			
Knows the sources of guidance for and importance of a team approach for addressing general food and nutrition needs of all children and children with special dietary needs.	3.7 ± 0.5	6 (50.0)	6 (50.0) ^c
Knows how to follow a medical authorization to modify meals for a child with special needs.	3.7 ± 0.5	6 (50.0)	6 (50.0) ^c
Knows district policies and procedures for serving children with special needs.	3.6 ± 0.5	6 (50.0)	6 (50.0) ^c
Ensures applicable policies are followed when providing school meals for children with special needs.	3.6 ± 0.5	6 (50.0) ^c	6 (50.0)
Implements district policies and procedures for ensuring that students with food allergies/special needs are managed correctly.	3.7 ± 0.5	6 (50.0) ^c	6 (50.0)
Works with health professionals in providing meals to students with special dietary needs.	3.5 ± 0.7	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

Functional Area 7: Financial Management and Accountability.

The Financial Management and Accountability functional area contains six competency statements and 90 knowledge and skill statements (Table 8). All statements had a mean importance rating of 2.8 or greater. Review-panel members identified 52 statements as knowledge or skills needed when professionals are hired; and 38 knowledge and skill statements at the “advanced” level. There were 12 knowledge and skill statements that received equal approval for inclusion under the “when hired” and “advanced” categories. The researchers made the final decision to place these statements at the “advanced” level. The knowledge statements under this category are listed below:

- “Knows local, state, and federal laws pertaining to records and document retention” was placed under competency 7.1.
- “Understands the value of technology in SN financial management and accountability” was placed under competency 7.4.

There were ten skill statements researchers determined placement for in the Financial Management and Accountability functional area as important “when hired” and at the “advanced” levels.

- “Reviews and maintains a current policy and procedures manual for the SN program” was placed under competency 7.1.
- “Follows contingency plans in the event of point-of-service hardware and/or software failure during meal service” was placed under competency 7.2.
- “Collaborates with school district administrator and school site principal to develop a system for payment of unpaid charges” was placed under competency 7.3.

- “Identifies problems/differences in the meal count/collection system for consolidation of line meal counts, and cash collections” was placed under competency 7.3.

The skill statements of equal agreement that were determined to be required at the “advanced” level are listed below:

- “Ensures crediting documentation is complete for all meal components/food items, as applicable” was placed under competency 7.1.
- “Maintain records and supporting documentation in accordance with federal, state, and local regulations and policies” was placed under competency 7.1.
- “Follows school district policies and procedures for addressing security and theft in the kitchen, storage, serving, and dining areas” was placed under competency 7.1.
- “Organizes and manages the functions of the local program to maintain a fiscally sound operation” was placed under competency 7.4.
- “Uses a team approach to encourage employee application of sound financial practices” was placed under competency 7.4.
- “Utilizes USDA foods to maximize cost savings” was placed under competency 7.4.

Three skill statements from competency 6.4 were added to the functional area, Financial Management and Accountability. These following statements were placed under competency 7.1 as “advanced” skill statements:

- “Ensures crediting documentation is complete for all meal components/food items, as applicable;”
- “Maintains (Child Nutrition) CN labels or Product Formulation Statements for items that cannot be credited using the Food Buying Guide, as applicable;” and

- “Maintains documentation, if applicable, that shows families are informed about the availability of reimbursable meals served under the National School Breakfast Program (NSBP) and National School Lunch Program (NSLP).”

The review panel’s agreement rating for Financial Management and Accountability showed a rating of 3.4 or greater. Review panelists agreed that the competencies accurately reflect the knowledge and skills listed under this functional area. This information is available in Table 10.

Table 8

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.1: Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the SN program.			
Knows financial elements of the SN program (i.e. Average Daily Participation (ADP) and food costs).	3.4 ± 0.7	4 (33.3)	8 (66.7)
Knows school district policies and procedures for meal charging.	3.6 ± 0.5	9 (75.0)	3 (25.0)
Identifies reimbursable meals and understands their impact on the financial status of the SN program.	3.8 ± 0.5	8 (66.7)	4 (33.3)
Knows approved policy and procedures for providing free- and reduced-price meal benefits.	3.7 ± 0.5	7 (58.3)	5 (41.7)
Knows local, state, and federal laws pertaining to records and document retention.	3.6 ± 0.7	6 (50.0)	6 (50.0) ^c
Assists parents/guardians with the completion of free- and reduced-price meal applications, if applicable.	3.0 ± 1.0	5 (45.5)	6 (54.5)
Maintains documentation, if applicable, that shows families are informed about the availability of reimbursable meals served under the National School Breakfast Program (NSBP) and National School Lunch Program (NSLP).	2.8 ± 0.9	5 (41.7)	7 (58.3) ^d

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cDetermined placement of knowledge/skill statement

^dStatement added from competency 6.4

(Table 8 continues)

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.1: Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the SN program.			
Monitors pre-paid students' accounts and notifies parents of the status of students' accounts.	3.4 ± 0.7	7 (58.3)	5 (41.7)
Knows federal, state, and local regulations for providing services and using USDA Foods in an emergency situation.	3.2 ± 0.8	1 (8.30)	11 (91.7)
Understands SN program financial goals and objectives.	3.5 ± 0.5	3 (25.0)	9 (75.0)
Maintains program integrity and accountability regarding meal requirements and documentation.	3.5 ± 0.5	8 (66.7)	4 (33.3)
Ensures implementation of all policies and procedures regarding students receiving free or reduced meal benefits.	3.8 ± 0.5	7 (58.3)	5 (41.7)
Follows the school district guidance regarding meals charged policy.	3.8 ± 0.5	8 (66.7)	4 (33.3)
Ensures crediting documentation is complete for all meal components/food items, as applicable.	3.5 ± 0.7	6 (50.0)	6 (50.0) ^{c d}
Maintains Child Nutrition (CN) labels or Product Formulation Statements for items that cannot be credited using the Food Buying Guide, as applicable.	3.3 ± 1.1	4 (33.3)	8 (66.7) ^d

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement^dStatement added from competency 6.4

(Table 8 continues)

(Table 8 continues)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.1: Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the SN program.			
Works with SN administrators to implement financial management and accountability practices consistent with local, state, and federal requirements.	3.3 ± 0.7	3 (25.0)	9 (75.0)
Maintains records and supporting documentation in accordance with federal, state, and local regulations and policies.	3.5 ± 0.7	6 (50.0)	6 (50.0) ^c
Follows school district policies and procedures for charging for in-kind meals, earned meals, and other unusual meal payments.	3.4 ± 0.9	5 (41.7)	7 (58.3)
Follows school district policies and procedures for addressing security and theft in the kitchen, storage, serving, and dining areas.	3.6 ± 0.5	6 (50.0)	6 (50.0) ^c
Reviews and maintains a current policy and procedures manual for the SN program.	3.1 ± 1.1	6 (50.0) ^c	6 (50.0)
Shares SN program financial goals and objectives with employees.	3.1 ± 0.7	4 (33.3)	8 (66.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

^cDetermined placement of knowledge/skill statement

(Table 8 continues)

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.2: Utilizes technology to support financial accountability needs in the SN program.			
Knows how to utilize technology to monitor, analyze, and report financial information, if applicable.	3.1 ± 0.8	4 (33.3)	8 (66.7)
Knows how to use contingency plans in the event of point-of-service hardware and/or software failure during meal service.	3.6 ± 0.5	7 (58.3)	5 (41.7)
Uses technology to monitor, analyze, and report financial information, if applicable.	3.2 ± 0.7	4 (33.3)	8 (66.7)
Follows contingency plans in the event of point-of-service (POS) hardware and/or software failure during meal service.	3.5 ± 0.5	6 (50.0) ^c	6 (50.0)
Competency 7.3: Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.			
Knows procedures for identifying a student as paid, reduced, or free meal eligibility.	3.7 ± 0.5	8 (66.7)	4 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 8 continues)

*(Table 8 continued)**Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.3: Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.			
Knows district policies and procedures for secure cash management.	3.8 ± 0.5	9 (75.0)	3 (25.0)
Maintains confidentiality of student information and transactions.	3.9 ± 0.3	9 (75.0)	3 (25.0)
Collaborates with school district administrator and school site principal to develop a system for payment of unpaid charges.	2.8 ± 0.8	6 (50.0) ^c	6 (50.0)
Monitors and audits cashier operations and cash reconciliation regularly.	3.8 ± 0.5	7 (58.3)	5 (41.7)
Follows district policies and procedures for bank deposits.	3.8 ± 0.6	8 (66.7)	4 (33.3)
Oversees cashiering activities involving the collection of monies and recording of daily receipts.	3.8 ± 0.5	8 (66.7)	4 (33.3)
Identifies problems/differences in the meal count/collection system for consolidation of line meal counts and cash collections.	3.5 ± 0.7	6 (50.0) ^c	6 (50.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement*(Table 8 continues)*

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.3: Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.			
Monitors and enforces procedures to safeguard cash and meal benefit identifiers from loss, theft, or misuse.	3.8 ± 0.5	8 (66.7)	4 (33.3)
Competency 7.4: Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.			
Knows procedures for documenting and evaluating amounts of food planned, prepared, and served.	3.7 ± 0.5	7 (58.3)	5 (41.7)
Knows SN program financial goals and objectives.	3.4 ± 0.7	5 (41.7)	7 (58.3)
Understands the value of technology in SN financial management and accountability.	3.2 ± 0.7	6 (50.0)	6 (50.0) ^c
Knows basic mathematical operations.	3.8 ± 0.4	12 (100.0)	0 (0.0)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 8 continues)

*(Table 8 continued)**Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.4: Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.			
Knows the importance of operating a financially sound program.	3.8 ± 0.5	10 (83.3)	2 (16.7)
Ensures daily participation records are accurate.	3.8 ± 0.5	9 (75.0)	3 (25.0)
Ensures that there is no overt identification of student eligibility by other students or staff.	3.8 ± 0.6	8 (66.7)	4 (33.3)
Organizes and manages the functions of the local program to maintain a fiscally sound operation.	3.5 ± 0.5	6 (50.0)	6 (50.0) ^c
Uses a team approach to encourage employee application of sound financial practices.	3.4 ± 0.7	6 (50.0)	6 (50.0) ^c

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement*(Table 8 continues)*

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.4: Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.			
Follows approved procedures for counting and claiming reimbursable meals.	3.9 ± 0.3	7 (58.3)	5 (41.7)
Utilizes USDA Foods to maximize cost savings.	3.5 ± 0.5	6 (50.0)	6 (50.0) ^c
Tracks expenses and revenue on a regular basis to better forecast future needs.	3.1 ± 0.8	4 (33.3)	8 (66.7)
Maintains list of emergency contact telephone numbers.	3.4 ± 0.9	7 (58.3)	5 (41.7)
Competency 7.5: Follows cost controls for the SN program.			
Knows district internal controls to assure that meal counts are accurate.	3.7 ± 0.5	6 (54.5)	5 (45.5)
Knows cost-effective techniques relevant to SN operations.	3.6 ± 0.5	3 (27.3)	8 (72.7)
Knows the importance of accurate counting and claiming of reimbursable meals using approved methods.	4.0 ± 0.0	6 (54.5)	5 (45.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)^cDetermined placement of knowledge/skill statement

(Table 8 continues)

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.5: Follows cost controls for the SN program.			
Knows the financial impact of cost saving production techniques.	3.5 ± 0.5	3 (27.3)	8 (72.7)
Knows the importance of meal costs on the financial status of the SN program.	3.3 ± 0.6	6 (54.5)	5 (45.5)
Knows how to calculate meals per labor hour and the significance of the results.	3.1 ± 0.7	2 (18.2)	9 (81.8)
Uses the food production record to document the amount of each menu item served to age/grade groups daily.	3.6 ± 0.5	6 (54.5)	5 (45.5)
Maintains documentation such as production records to show nutritional requirements and meal patterns are met daily.	3.9 ± 0.3	6 (54.5)	5 (45.5)
Records planned and actual number of portions for each menu item served according to contribution size for age/grade groups.	3.8 ± 0.4	6 (54.5)	5 (45.5)
Monitors all in-kind meals when documenting number of menu items planned and served.	3.6 ± 0.5	6 (54.5)	5 (45.5)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 8 continues)

*(Table 8 continued)**Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.5: Follows cost controls for the SN program.			
Ensures meal benefit documentation is up-to-date in point-of-service (POS) system, if applicable.	3.4 ± 0.8	5 (45.5)	6 (54.5)
Monitors point-of-service (POS) meal count to ensure only one meal per eligible student per meal service is claimed for reimbursement.	3.7 ± 0.6	6 (54.5)	5 (45.5)
Monitors attendance and adjusts or checks on each school's daily meal count for accuracy, if applicable.	3.3 ± 0.9	5 (45.5)	6 (54.5)
Ensures accurate consolidation of meal counts from various service lines, if applicable.	3.5 ± 0.5	6 (54.5)	5 (45.5)
Operates a financially sound, cost-effective SN program of high integrity.	3.6 ± 0.5	5 (45.5)	6 (54.5)
Reviews monthly financial reports to ensure that labor, food, and/or supply costs are within targeted ranges.	3.5 ± 0.5	2 (18.2)	9 (81.8)
Implements a system of cost control measures throughout the school nutrition program.	3.4 ± 0.7	2 (18.2)	9 (81.8)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 8 continues)*

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.5: Follows cost controls for the SN program.			
Utilizes the profit and loss statement to assist in better financial decision-making.	3.4 ± 0.7	2 (18.2)	9 (81.8)
Implements a system of internal controls to reduce theft by employees and students.	3.6 ± 0.7	7 (63.6)	4 (36.4)
Evaluates free- and reduced-price applications to determine eligibility for benefits, if applicable.	2.9 ± 1.4	5 (45.5)	6 (54.5)
Calculates and utilizes meal per labor hour to monitor employee productivity and assist in efficient staffing.	2.8 ± 1.1	2 (18.2)	9 (81.8)
Conducts random checks of financial activities and records, if applicable.	3.3 ± 0.9	3 (30.0)	7 (70.0)
Develops a system for controlling keys and access to product storage areas.	3.4 ± 0.9	7 (63.6)	4 (36.4)
Implements the meal count/collection system to ensure that no overt identification of free- or reduced-price meal recipients occurs.	3.5 ± 1.0	6 (54.5)	5 (45.5)
Uses approved procedures to identify potential problems in the meal count system at the site level.	3.5 ± 0.7	1 (9.10)	10 (90.9)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 8 continues)

*(Table 8 continued)**Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD)^a	Know/Perform Categories^b	
		When Hired	Advanced
Competency 7.5: Follows cost controls for the SN program.			
Utilizes basic math skills accurately in all calculations needed in managing the SN program.	3.9 ± 0.3	10 (90.9)	1 (9.10)
Competency 7.6: Develops and monitors financial reports and accounts for the SN program.			
Knows procedures for counting and claiming school meals at point-of-service (POS).	3.8 ± 0.7	4 (44.4)	5 (55.6)
Understands the importance of accurate, current, and complete records to document SN financial accountability.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Understands the requirements and approved methods for completing financial reports.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Knows the types of information and acceptable methods for preparing food production records as required for compliance with federal and state regulations.	3.7 ± 0.5	7 (77.8)	2 (22.2)
Understands the importance of complete and accurate records and documentation.	3.7 ± 0.5	7 (77.8)	2 (22.2)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 8 continues)*

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.6: Develops and monitors financial reports and accounts for the SN program.			
Maintains documentation that supports the number of afterschool program snacks served daily and claimed, if applicable.	3.6 ± 0.7	4 (44.4)	5 (55.6)
Ensures meal counts are completed and consolidated daily.	3.9 ± 0.3	6 (66.7)	3 (33.3)
Applies basic math skills to prepare accurate and complete financial reports.	3.8 ± 0.4	7 (77.8)	2 (22.2)
Presents accurate, complete financial reports regularly to the district supervisor and other interested parties.	3.6 ± 0.5	4 (44.4)	5 (55.6)
Maintains accurate and complete records of all USDA Foods and food items purchased.	3.3 ± 0.9	4 (44.4)	5 (55.6)
Ensures proper documentation is maintained for a food recall.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Maintains production records in an accurate manner to provide an audit trail for administrative review.	3.8 ± 0.4	5 (55.6)	4 (44.4)
Reconciles point-of-service (POS) records daily.	3.8 ± 0.4	6 (66.7)	3 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 8 continues)

(Table 8 continued)

Functional Area 7: Financial Management and Accountability Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 7.6: Develops and monitors financial reports and accounts for the SN program.			
Maintains accurate production records of planned menus, menu components, amount of food produced, food served, and food discarded.	3.7 ± 0.5	6 (66.7)	3 (33.3)
Ensures accurate meal eligibility category is confirmed at the point-of-service (POS).	3.8 ± 0.4	6 (66.7)	3 (33.3)
Identifies and appropriately counts adult meals, second meals, or other non-program foods sold.	3.9 ± 0.3	6 (66.7)	3 (33.3)
Maintains and monitors required program and employee records and documents for accuracy and completeness according to district policies and procedures.	3.7 ± 0.5	6 (66.7)	3 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

Functional Area 8: Meal Preparation and Service.

The Meal Preparation and Service functional area contains six competency statements and 61 knowledge and skill statements (Table 9). All statements had a mean importance rating of 2.8 or greater. Review-panel members identified 47 statements as knowledge or skills needed when professionals are hired, and 14 statements as necessary at the “advanced” level. The review panel’s agreement rating for Meal Preparation and Service showed a rating of 2.9 or greater, indicating the panel’s agreement that the competencies accurately reflect the knowledge and skills listed under this functional area. This information is available in Table 10.

Table 9

Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.1: Follows federal, state, and local policies and procedures to meet compliance requirements for meal preparation and service in the SN program.			
Knows how to use herbs and spices to enhance flavor when using less salt/sodium.	3.0 ± 0.9	1 (11.1)	8 (88.9)
Knows how to appropriately implement offer-versus-serve (OVS) properly, if applicable.	3.7 ± 0.5	7 (77.8)	2 (22.2)
Knows the menu items/components that meet USDA meal requirements that are available to students throughout meal service.	3.8 ± 0.4	7 (77.8)	2 (22.2)
Knows district policies and procedures for the preparation of foods for students with allergies/special needs.	3.7 ± 0.5	5 (55.6)	4 (44.4)
Knows high standards for quality of food production in all SN programs.	3.4 ± 0.5	5 (55.6)	4 (44.4)
Knows how to follow written medical diets and instructions on file.	3.6 ± 0.5	6 (66.7)	3 (33.3)
Knows effective use of USDA Foods.	3.4 ± 0.5	3 (33.3)	6 (66.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)

^bNumber responding (percentage)

(Table 9 continues)

*(Table 9 continued)**Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.1: Follows federal, state, and local policies and procedures to meet compliance requirements for meal preparation and service in the SN program.			
Incorporates the use of herbs and spices to enhance flavor when using less salt/sodium.	2.8 ± 1.0	2 (22.2)	7 (77.8)
Ensures offer-versus-serve (OVS) is being implemented properly, if applicable.	3.9 ± 0.3	6 (66.7)	3 (33.3)
Ensures menu items/components that meet USDA meal requirements are available to students throughout meal service.	3.8 ± 0.4	6 (66.7)	3 (33.3)
Follows school district policies and procedures for the preparation of foods for students with allergies/special needs.	3.7 ± 0.5	5 (55.6)	4 (44.4)
Maintains high standards for quality of food production in all SN programs.	3.6 ± 0.5	6 (66.7)	3 (33.3)
Keeps written medical diets and instructions on file.	3.7 ± 0.5	7 (77.8)	2 (22.2)
Ensures effective use of USDA Foods.	3.2 ± 0.7	3 (33.3)	6 (66.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 9 continues)*

*(Table 9 continued)**Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.2: Follows standardized recipes that meet the requirements of the SN program.			
Knows how standardized recipes ensure the production of quality food.	3.7 ± 0.5	6 (66.7)	3 (33.3)
Knows how to standardize new recipes for site level operations, as applicable.	3.2 ± 1.0	1 (11.1)	8 (88.9)
Knows the importance of using accepted methods when making recipe adjustments for the number of customers served.	3.3 ± 0.5	4 (44.4)	5 (55.6)
Ensures that standardized recipes are not modified without appropriate approval.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Enforces use of standardized recipes to reduce waste and control food quality.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Uses only tested and standardized recipes in the production of food for the SN program.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Adjusts ingredient quantities in standardize recipes to yield planned number of servings.	3.4 ± 0.5	4 (44.4)	5 (55.6)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 9 continues)*

(Table 9 continued)

Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.3: Organizes food preparation and production that allow for efficient and effective use of equipment.			
Knows how to calibrate scales to ensure accuracy of weights.	3.2 ± 0.8	5 (55.6)	4 (44.4)
Knows correct procedures, techniques, and tools to use in weighing and measuring ingredients for food preparation.	3.6 ± 0.5	7 (77.8)	2 (22.2)
Knows how to maintain the correct equipment and tools for controlling portions of food items served to students.	3.4 ± 0.5	7 (77.8)	2 (22.2)
Maintains a supply of the correct equipment and tools for controlling portions of food items served to students.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Ensures ingredients are measured using correct procedures, techniques, and tools.	3.7 ± 0.5	5 (55.6)	4 (44.4)
Demonstrates how weights and measures are used in recipes to ensure quality foods.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Demonstrates how to calibrate scales to ensure accuracy in weighing.	3.1 ± 0.8	6 (66.7)	3 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 9 continues)

*(Table 9 continued)**Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.4: Follows policies and procedures for maintaining food production records for the SN program.			
Knows about over- and under-production of food and how to implement corrective action.	3.4 ± 0.5	4 (44.4)	5 (55.6)
Knows how to utilize production records as a tool for food preparation and service.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Knows how to utilize various procedures for evaluation of prepared food.	3.3 ± 0.5	4 (44.4)	5 (55.6)
Develops and/or utilizes a system for reviewing over- and under-production of food and implementing corrective action.	3.2 ± 0.4	5 (55.6)	4 (44.4)
Uses production records as a tool for food preparation and service.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Utilizes accepted procedures for evaluation of food prepared.	2.9 ± 0.6	5 (55.6)	4 (44.4)
Monitors food production to reduce waste from over-production.	3.6 ± 0.5	6 (66.7)	3 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 9 continues)*

(Table 9 continued)

Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.5: Creates and utilizes production planning and scheduling procedures in the SN program to produce quality foods.			
Knows standards for preparing, holding, distributing and serving food in volumes that maintain nutrition and food quality.	3.4 ± 0.5	5 (55.6)	4 (44.4)
Knows common measures used in the production of food products.	3.6 ± 0.5	8 (88.9)	1 (11.1)
Knows food preparation techniques that allow for efficient use of product, labor, and equipment.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Knows principles of pre-planning, planning, and scheduling food production to maximize efficient use of time and equipment.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Knows the importance of production scheduling for optimum holding of food items.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Knows the impact of operational influences and resources on food production (e.g., physical facilities, equipment constraints, personnel skills, and schedules).	3.2 ± 0.7	4 (44.4)	5 (55.6)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

(Table 9 continues)

*(Table 9 continued)**Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.5: Creates and utilizes production planning and scheduling procedures in the SN program to produce quality foods.			
Monitors preparation techniques to ensure the yield of high-quality food.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Utilizes historical data, trends, and standardized recipe to forecast number of servings needed for each menu item served daily.	3.6 ± 0.5	5 (55.6)	4 (44.4)
Suggests changes to menu planner for menus and preparation techniques.	3.1 ± 0.6	3 (33.3)	6 (66.7)
Competency 8.6: Implements foodservice procedures that produce high quality food that is appealing for the SN program.			
Understands the value of a clean, pleasant dining environment.	3.6 ± 0.5	9 (100.0)	0 (0.0)
Knows the importance of monitoring food production daily to ensure quality of food served.	3.6 ± 0.5	8 (88.9)	1 (11.1)
Knows how preparation techniques influence the quality of food products.	3.6 ± 0.5	6 (66.7)	3 (33.3)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 9 continues)*

*(Table 9 continued)**Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements*

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.6: Implements foodservice procedures that produce high quality food that is appealing for the SN program.			
Knows time and temperature relationships associated with appearance and palatability of food.	3.6 ± 0.5	7 (77.8)	2 (22.2)
Knows meal service principles that enhance serving line operations.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Knows food quality standards to use in evaluating finished meal items.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Knows key elements of food presentation to increase eye appeal and student acceptance of food served.	3.3 ± 0.5	4 (44.4)	5 (55.6)
Knows the fundamentals of creating a pleasant, appealing, and safe environment for serving customers nutritious meals.	3.4 ± 0.5	7 (77.8)	2 (22.2)
Knows basic rules for setting up a service line.	3.4 ± 0.5	7 (77.8)	2 (22.2)
Knows the importance of serving food attractively without spills.	3.3 ± 0.5	8 (88.9)	1 (11.1)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)*(Table 9 continues)*

(Table 9 continued)

Functional Area 8: Meal Preparation and Service Knowledge and Skill Statements

Competency Statement Knowledge/Skill Statement	How Important? (M ± SD) ^a	Know/Perform Categories ^b	
		When Hired	Advanced
Competency 8.6: Implements foodservice procedures that produce high quality food that is appealing for the SN program.			
Ensures all menu items are prepared to preserve nutrients and encourage meal consumption.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Maintains a pleasant, safe and clean physical environment in the school cafeteria to encourage student participation.	3.6 ± 0.5	7 (77.8)	2 (22.2)
Ensures the aesthetic qualities of menu items are maintained throughout the meal period.	3.4 ± 0.5	6 (66.7)	3 (33.3)
Establishes food preparation procedures to conserve the nutritive value, enhance flavor/attractiveness, and promote freshness of the final product.	3.3 ± 0.5	5 (55.6)	4 (44.4)
Identifies various techniques to display food for the SN program.	3.2 ± 0.4	2 (22.2)	7 (77.8)
Monitors the service line to see that it moves smoothly.	3.6 ± 0.5	7 (77.8)	2 (22.2)
Ensures food items are served to maintain quality and appearance standards.	3.4 ± 0.5	3 (33.3)	6 (66.7)

^aScale = 1 (*not important*) to 4 (*extremely important*)^bNumber responding (percentage)

Table 10

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M ± SD</i>	<i>N</i>	<i>M ± SD</i>
Personnel Management				
Competency 1.1: Manages SN operations and staff according to federal, state, and local district laws, regulations, policies and procedures.	25	3.5 ± 0.8	25	3.4 ± 0.8
Competency 1.2: Participates in professional development training and exhibits professional behavior characteristic of a School Nutrition Manager.	22	3.2 ± 1.0	22	3.3 ± 0.8
Competency 1.3: Conducts training with staff that positively impact foodservice operations and meet local, state, and federal requirements.	22	3.3 ± 0.8	19	3.5 ± 0.9
Competency 1.4: Adheres to professional codes of conduct for diverse staff and interpersonal relationships among teachers, principals, other school staff, and students.	21	3.5 ± 0.8	21	3.5 ± 0.8
Competency 1.5: Monitors and evaluates employee performance and morale.	21	3.5 ± 0.8	21	3.5 ± 0.8
Competency 1.6: Provides leadership to the SN staff that promotes team effectiveness and productivity.	20	3.4 ± 0.8	20	3.4 ± 0.8

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)

^bNumber responding (percentage)

(Table 10 continues)

(Table 10 continued)

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M ± SD</i>	<i>N</i>	<i>M ± SD</i>
Personnel Management				
Competency 1.7: Communicates with employees in a manner that promotes cooperation and reduces conflicts.	19	3.6 ± 0.5	20	3.5 ± 0.8
Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.	16	3.4 ± 0.7	16	2.9 ± 1.1
Sanitation, Safety, and Security				
Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.	16	3.2 ± 1.0	16	3.4 ± 0.8
Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.	15	3.2 ± 1.0	14	3.5 ± 0.8
Competency 2.3: Understands and implements Hazard Analysis and Critical Control Points (HACCP) and food safety practices in the SN program.	14	3.5 ± 0.5	14	3.3 ± 0.8

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)

(Table 10 continues)

*(Table 10 continued)**Competency Statements: Mean Agreement Ratings and Standard Deviations*

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M ± SD</i>	<i>N</i>	<i>M ± SD</i>
Facility and Property Management				
Competency 3.1: Understands and follows policies and procedures that promote and protect facility/property functions and services.	14	2.9 ± 0.7	14	2.9 ± 0.8
Competency 3.2: Follows district policies related to equipment operation, safety, and maintenance practices.	13	3.6 ± 0.5	13	3.7 ± 0.5
Competency 3.3: Uses preventive maintenance and equipment management practices to create a safe work environment.	13	3.3 ± 0.8	13	3.4 ± 0.7
Competency 3.4: Implements energy and resource conservation practices for managing equipment and the SN facility.	13	3.2 ± 0.8	13	3.3 ± 0.9
Marketing, Communication, and Customer Service				
Competency 4.1: Promotes a school environment that fosters positive social interaction and promote healthy eating behaviors.	13	3.3 ± 0.6	13	3.3 ± 0.6

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)*(Table 10 continues)*

(Table 10 continued)

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	N	M ± SD	N	M ± SD
Marketing, Communication, and Customer Service				
Competency 4.2: Develops and implements best practices for providing and maintaining a quality dining experience.	13	3.2 ± 0.4	13	3.4 ± 0.7
Competency 4.3: Implements customer service techniques to promote satisfaction.	13	3.4 ± 0.7	13	3.4 ± 0.7
Competency 4.4: Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.	13	3.2 ± 0.7	13	3.4 ± 0.5
Procurement and Inventory Management				
Competency 5.1: Utilizes forecasting methods to ensure adequate quantities of food are purchased.	12	3.7 ± 0.5	12	3.7 ± 0.5
Competency 5.2: Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.	12	3.4 ± 0.7	12	3.5 ± 0.7
Competency 5.3: Follows approved federal, state, and local regulations for utilizing and serving USDA Foods.	12	3.5 ± 0.5	12	3.6 ± 0.5

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)

(Table 10 continues)

(Table 10 continued)

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M ± SD</i>	<i>N</i>	<i>M ± SD</i>
Procurement and Inventory Management				
Competency 5.4: Follows proper procedures for receiving food and supplies.	11	3.6 ± 0.5	12	3.5 ± 0.5
Competency 5.5: Follows procedures to ensure that appropriate storage and issuing techniques are implemented.	12	3.5 ± 0.5	12	3.5 ± 0.5
Nutrition and Meal Management				
Competency 6.1: Ensures all meals in the SN program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.	12	3.6 ± 0.5	12	3.7 ± 0.5
Competency 6.2: Follows SN program guidelines for serving and offering meal components to students.	12	3.5 ± 0.7	12	3.5 ± 0.7
Competency 6.3: Follows federal, state, and local guidelines and regulations for addressing special dietary needs in the SN program.	12	3.7 ± 0.5	12	3.6 ± 0.5

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)

(Table 10 continues)

(Table 10 continued)

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M</i> ± <i>SD</i>	<i>N</i>	<i>M</i> ± <i>SD</i>
Financial Management and Accountability				
Competency 7.1: Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the school nutrition program.	12	3.5 ± 0.7	12	3.5 ± 0.7
Competency 7.2: Utilizes technology to support financial accountability needs in the SN program.	12	3.5 ± 0.5	12	3.5 ± 0.5
Competency 7.3: Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.	12	3.5 ± 0.5	12	3.3 ± 0.9
Competency 7.4: Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.	12	3.6 ± 0.5	11	3.6 ± 0.5
Competency 7.5: Follows cost controls for the SN program.	11	3.4 ± 0.9	11	3.4 ± 0.9
Competency 7.6: Develops and monitors financial reports and accounts for the SN program.	9	3.4 ± 0.7	9	3.6 ± 0.5

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)

(Table 10 continues)

(Table 10 continued)

Competency Statements: Mean Agreement Ratings and Standard Deviations

Functional Area	Statement Accurately Reflects the Knowledge and Skills Listed		Statement is Clearly Worded	
	<i>N</i>	<i>M ± SD</i>	<i>N</i>	<i>M ± SD</i>
Meal Preparation and Service				
Competency 8.1: Follows federal, state, and local policies and procedures to meet compliance requirements for meal preparation and service in the SN program.	9	3.6 ± 0.5	9	3.7 ± 0.5
Competency 8.2: Follows standardized recipes that meet the requirements of the SN program.	8	3.8 ± 0.5	9	3.7 ± 0.5
Competency 8.3: Organizes food preparation and production that allows for efficient and effective use of equipment.	9	3.6 ± 0.5	12	3.6 ± 0.5
Competency 8.4: Follows policies and procedures for maintaining food production records for the SN program.	9	3.3 ± 0.5	9	3.4 ± 0.5
Competency 8.5: Creates and utilizes production planning and scheduling procedures in the SN program to produce quality foods.	9	3.6 ± 0.5	9	3.7 ± 0.5
Competency 8.6: Implements foodservice procedures that produce high quality food that is appealing for the SN program.	9	3.4 ± 0.7	9	3.4 ± 0.7

^aScale = 1 (*strongly disagree*) to 4 (*strongly agree*)^bNumber responding (percentage)

Conclusions and Recommendations

The purpose of this study was to identify the competencies, and to confirm the knowledge and skills needed by school nutrition (SN) managers supervising and coordinating school foodservice operations across the United States, and to create a user-friendly resource for child nutrition professionals. This multi-phase project included feedback from child nutrition professionals serving on expert panels and a review panel representing United States Department of Agriculture Food and Nutrition Service representatives, State agency representatives, SN directors, SN managers, and other child nutrition experts in the field. The result of expert- and review-panel reviews confirmed the development of 39 competencies, 165 knowledge, and 342 skill statements under eight functional areas.

There were only two statements that did not meet the inclusion criteria, and they were deleted from the final resource. Researchers identified 33 knowledge and skill statements that were equally voted for as needed “when hired” and as “advanced.” Each of the statements were reviewed by researchers, and their placement was determined as knowledge and skills needed “when hired” or at “advanced” stages. Only one of the statements was eliminated, because of its similarity to a previously confirmed statement under another functional area, and the declaration that it was a skill carried out by an administrator. The confirmed competencies, knowledge, and skills were developed into a resource, and used to develop useful tools for SN managers.

Education and Training Implications

Competencies, knowledge, and skills confirmed in this project were used to develop a resource. The resource includes competencies, knowledge, and skill statements under eight functional areas: Personnel Management; Sanitation, Safety, and Security; Facility and Property Management; Marketing, Communication, and Customer Service; Procurement and Inventory Management; Nutrition and Meal Management; Financial Management and Accountability; and

Meal Preparation and Service. The resource, *Competencies, Knowledge, and Skills for School Nutrition Managers* can be used by SN administrators and other professionals to develop job descriptions; to create or revise professional standards; and to develop training protocols and resources for SN managers.

Additional tools, a job description template, a peer-to-peer mentoring form, and a performance appraisal form, were developed from the web-based resource as accessible, online tools that could be modified by SN administrators to meet their needs. Each tool has detailed instructions of its purpose and suggestions for how it could be used by SN managers. The job description template could be used to add competency, knowledge, and skill statements when hiring SN managers. The peer-to-peer mentoring form and performance appraisal form are also fillable forms that could be used identify learning/training needs and performance challenges, and to monitor and document progress of SN managers' job duties and responsibilities. The three tools are accessible via the resource and a hyperlink on the Institute of Child Nutrition website. Furthermore, the resource could also be used to develop training modules and other resources to assess job performance and to customize professional development activities for SN managers. The full resource is included in the Appendix of this report.

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Appendix

Competencies, Knowledge and Skills for School Nutrition Managers

Competencies, Knowledge, and Skills for School Nutrition Managers



Applied Research Division • The University of Southern Mississippi

**Competencies, Knowledge, and Skills for
School Nutrition Managers**

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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.

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Introduction

Since its inception, the Institute of Child Nutrition, Applied Research Division (ICN, ARD) has been at the forefront in identifying the competencies, knowledge, and skills needed by professionals working in the child nutrition arena. The resources created, as a result of the work conducted by ICN, ARD, are designed to identify performance standards; to guide efforts to support employees' performance; to measure job responsibilities and behaviors; and to show how well employees perform in their individual and team-related roles to meet organizational goals.

The ICN, ARD has conducted research and developed the competencies, knowledge, and skills for child nutrition professionals for more than 20 years. Initial ICN, ARD studies established a research-based competency model in 1995 for entry-level and advanced school nutrition (SN) managers. A resource was developed to identify the competencies, knowledge, and skills for SN managers, and was published in 1996. Since that time, the ICN, ARD has conducted periodic studies and developed resources in 2003 and 2007 that identified and updated competencies, knowledge, and skills for SN managers. This current resource is the effort of the ICN, ARD to update and revise the current competencies, knowledge, and skills resource to reflect changes in the regulations that govern SN programs (i.e., Healthy, Hunger Free Kids Act of 2010) and more current operational issues that impact management of SN programs at the school-site level.

The *Competencies, Knowledge, and Skills for School Nutrition Managers* resource focuses on the identified functional areas, competencies, knowledge, and skills needed for SN managers to effectively operate an SN program. The following definitions were used to guide the process:

- School nutrition managers oversee all aspects of the local site-based SN program.
- Functional areas are the broad groupings or divisions of job responsibilities that are performed by managers within the local child care operation. These categories serve as the umbrella for all job responsibilities that occur on a daily, weekly, seasonal, or yearly basis.
- Competencies are the underlying characteristics within each functional area that lead to successful performance. They may include knowledge and skills, as well as various levels of motivation.
- Knowledge is the information a person has in specific content areas that is necessary for successful performance in a competency area.
- Skills are the abilities to perform certain physical, mental, and/or interpersonal tasks that are necessary for successful performance in a competency area.
- When hired indicates a basic level of knowledge and understanding of a competency area; a general ability to communicate basic understanding of local, state, and national regulations, as well as program requirements; and a reliance on observation and guidance from others in the field to increase effectiveness and outcomes.
- Advanced is a higher level of knowledge and understanding of the competency areas, as well as the ability to communicate, make decisions, solve problems, and support staff based on advanced knowledge of local, state, and national regulations and program requirements.

The eight identified functional areas that complete the job responsibilities for SN managers are listed below:

- Personnel Management;
- Sanitation, Safety, and Security;
- Facility and Property Management;
- Marketing, Communication, and Customer Service;
- Procurement and Inventory Management;
- Nutrition and Meal Management;
- Financial Management and Accountability; and
- Meal Preparation and Service.

In addition to the eight functional areas, there are 39 competencies, 165 knowledge statements, and 343 skill statements to be included within the eight functional areas.

The functional areas, competencies, knowledge, and skills identified for this resource will offer guidance for the role of the SN manager. School nutrition managers and SN administrators can use this resource as a framework for identifying qualified staff for entry-level and advanced-level positions in the child care setting. The resource can also be used by individuals as a basis for advancing their knowledge and skills while working in an SN setting, and by management to identify training needs among current staff. In addition, this resource can be used to assess current training programs by identifying strengths and weakness and training outcomes. While job tasks and requirements for an SN manager professional differ from state to state and from facility to facility, the *Competencies, Knowledge, and Skills for School Nutrition Managers* resource is designed to be used as a guide for professional development, job description development, assessment and evaluation, and as training development.

How to Use this Resource

The ICN, ARD's *Competencies, Knowledge, and Skills for School Nutrition Managers* resource outlines baseline and advance knowledge and skill statements recommended for SN managers to effectively perform at the local school site.

This document provides competency, knowledge, and skill information that can empower SN professionals to strengthen their programs in a variety of ways:

- An SN manager may use the information as an assessment tool in order to facilitate professional development.
- An SN administrator may use the information to compare the characteristics of an individual manager's current, observed workplace practices against the recommended knowledge and skills described in the resource. Differences or shortfalls in job performance, which are identified in this comparison, can be used as teaching points and also to establish learning and growth opportunities.
- An SN administrator may use the information to offer mentoring and educational opportunities for the SN managers, or aspiring SN managers, to effectively function in his or her role. By using this resource, an SN manager, or an aspiring SN manager, can modify his or her own professional career path by creating professional goals, while working directly with a mentor (trusted advisor). Achieving the defined goal(s) should foster increased knowledge or skill attainment, which may be gained through additional learning experiences, specialty certifications, academic education and/or advanced degrees.
- School nutrition administrators may use the information to identify and develop job position functions. The competencies, knowledge, and skills resource can be used to help identify job descriptions and interview questions for prospective staff.

A section of this resource has been dedicated to providing tools to apply the competencies, knowledge, and skills information shared. This section is titled Application Tools and will include the following: a job description template (as a fillable form), an individual mentoring plan for SN managers form, and a competency based performance appraisal (as a fillable form). Each tool will have detailed instructions on its usage and on how to complete the document. To allow for ease of use, the full version of each tool shown in the Application Tools section has been embedded in electronic version of this resource. To download these tools, please visit the following link: <https://theicn.org/icn-resources-a-z/competencies-knowledge-and-skills-for-school-nutrition-managers>



Functional Area 1: Personnel Management

This functional area is defined as the functions of Child Nutrition Programs that maximize employee performance to accomplish the goals of the organization. These functions include planning, organizing, directing, developing, and controlling the performance of the workplace.

Core Competencies:

- Competency 1.1: Manages school nutrition operations and staff according to federal, state, and local district laws, regulations, policies and procedures.
- Competency 1.2: Participates in professional development training and exhibits professional behavior characteristic of a school nutrition manager.
- Competency 1.3: Conducts training sessions with staff that positively impact foodservice operations and meet local, state, and federal requirements.
- Competency 1.4: Adheres to professional codes of conduct for diverse staff and interpersonal relationships among teachers, principals, other school staff, and students.
- Competency 1.5: Monitors and evaluates employee performance and morale.
- Competency 1.6: Provides leadership to school nutrition staff that promotes team effectiveness and productivity.
- Competency 1.7: Communicates with employees in a manner that promotes cooperation and reduces conflicts.
- Competency 1.8: Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.

Functional Area 1: Personnel Management

Competency 1.1

Manages school nutrition operations and staff according to federal, state, and local district laws, regulations, policies and procedures.

Knowledge

When Hired

- Understands organizational structure of district school nutrition program and lines of authority.
- Knows principles of effective delegation.
- Knows how to communicate food and nutrition standards/regulations to staff.

Advanced

- Knows civil rights legislation.
- Knows district policies and procedures for selecting, supervising, disciplining, promoting, and terminating employees.
- Knows policies and procedures for evaluating employees.
- Knows labor union contract requirements related to the school nutrition program, where applicable.
- Knows local, state, and federal legislation pertaining to personnel management.

Skills

When Hired

- Maintains personnel records and documentation as required by the school district.
- Follows district policies and procedures in selecting, supervising, disciplining, training, promoting, and terminating employees.
- Ensures employees adhere to district policies and procedures for cash operations and point of service activities.
- Maintains employees' contact information in the event of injury or emergency.
- Works with school nutrition administration to implement personnel practices consistent with local, state, and federal requirements.
- Works within the school site and district organizational lines of authority.

Advanced

- Adheres to union agreement procedures related to the school nutrition program, if applicable.
- Follows procedures for responding to union actions and grievances, if applicable.

Functional Area 1: Personnel Management

Competency 1.2

Participates in professional development training and exhibits professional behavior characteristic of a school nutrition manager.

Knowledge

When Hired

- Understands the importance of representing school nutrition to others in a professional manner.
- Knows the importance of professional standards and training.

Advanced

- Knows professional development requirements and sources for meeting the requirements.

Skills

When Hired

- Implements and models high professional standards in the school nutrition program.
- Models professional behavior and enforces standards for school nutrition staff.
- Attends trainings to learn/review menu and meal pattern requirements, as appropriate.
- Completes food safety certificate program.
- Provides training to employees.

Advanced

- Develops a plan for personal professional development and encourages and assists employees in complying with professional development requirements.
- Successfully completes training on CPR, the Heimlich Maneuver, and/or first aid, as applicable.

Functional Area 1: Personnel Management

Competency 1.3

Conducts training sessions with staff that positively impact foodservice operations and meet local, state, and federal requirements.

Knowledge

When Hired

- None

Skills

When Hired

- Trains employees in work simplification techniques.
- Proficient in use of technology and able to train employees, if applicable.
- Trains cashiers and other staff to recognize reimbursable meals at point-of-service (POS).
- Trains employees to utilize the approved system for accurately counting and claiming meals.
- Trains employees to recognize reimbursable meals accurately.
- Trains employees in the causes and prevention of foodborne illnesses.
- Trains employees on proper procedures to calibrate food thermometers.
- Ensures that all employees attend training on Hazard Analysis Critical Control Points (HACCP) principles, and ensures employees understands the importance of the time/temperature relationship to food safety.
- Trains employees on the proper techniques for lifting.
- Trains employees on the use, care, and safe operation of equipment.
- Trains employees on safety principles, policies, procedures, and guidelines.

(Skills, When Hired, continued on next page, second column.)

Functional Area 1: Personnel Management

Advanced

- Knows sources for appropriate education and training materials.
- Knows methods of adult education to train employees.

When Hired

- Trains employees on weighing and measuring ingredients.
- Institutes a training process for all kitchen staff on receiving and storing foods properly.
- Provides orientation to the school nutrition program and school cafeteria for new employees.
- Provides orientation to new staff members regarding job description, including duties and responsibilities for preparing high quality, nutritious food.
- Includes on-the-job training in customer service as part of professional standards.
- Trains staff on an ongoing, regular, and as-needed basis on skills needed to perform effectively and correctly.
- Trains employees on proper pest control procedures.
- Trains employees in district policies and procedures for cash management.

Advanced

- Trains employees on the technology utilized in the operation of the school nutrition program, if applicable.
- Employs coaching techniques in conjunction with training to improve employee performance.
- Trains employees on energy conservation measures in the school environment.
- Trains employees on which type of extinguisher to use on which type of fire.
- Implements a program of cross-training for all employees to increase productivity.
- Trains and drills employees on district/school emergency plans.
- Trains employees on their role in the crisis/emergency plan.



Competency 1.4

Adheres to professional codes of conduct for diverse staff and interpersonal relationships among teachers, principals, other school staff, and students.

Knowledge

When Hired

- Understands the impact of workplace diversity and the importance of working effectively in a diverse workplace.
- Knows district policies on student relations/interpersonal relationships.

Advanced

- None

Skills

When Hired

- Promotes respect and appreciation for the individuals who make up the workforce.
- Manages a workplace of diverse employees who have varied experiences and skills.

Advanced

- None

Functional Area 1: Personnel Management

Competency 1.5
Monitors and evaluates employee performance and morale.

Knowledge

When Hired

- Knows policies and procedures for evaluating employees.
- Understands the importance of employee recognition.

Skills

When Hired

- Evaluates employees fairly utilizing the job description, according to district procedures.
- Monitors staff activities to ensure all tasks are completed.
- Monitors employees during the food preparation period to ensure the yield of high quality food meets nutrition guidelines.
- Recognizes reimbursable meals, and monitors employees during meal service periods.
- Ensures employees know the role of sanitation and personal hygiene in food safety.
- Monitors employees' activities to ensure hands are washed correctly, and at appropriate times, to prevent food contamination.
- Ensures employees follow procedures for proper glove use to prevent contamination of food products.
- Counsels employees on work-related concerns to encourage good employee morale and to improve performance.
- Acknowledges and recognizes personnel for outstanding work performance and accomplishments.

Functional Area 1: Personnel Management

Advanced

- None.

Advanced

- Monitors and assesses employee performance on an ongoing basis to assist with determining departmental and individual training needs.
- Provides leadership with a focus on employee satisfaction, program improvement, and employee productivity.



Competency 1.6

Provides leadership to school nutrition staff that promotes team effectiveness and productivity.

Knowledge

When Hired

- Understands the importance of good leadership skills in managing the school nutrition program.
- Knows techniques of time management.

Advanced

- Knows the importance of setting specific, measurable, achievable, relevant, and time-bound (SMART) goals.

Skills

When Hired

- Provides fair, consistent, and compassionate leadership in managing school nutrition program and employees.
- Treats employees and others with respect.
- Promotes a team approach among employees to problem-solve and meet program goals.
- Demonstrates flexibility and the ability to work effectively in a fast-paced, dynamic work environment.
- Demonstrates an open approachable management style.
- Supervises employees effectively to ensure school nutrition goals are met.
- Relates to employees as a leader and not as a friend.

Advanced

- Encourages employees to incorporate energy saving techniques as a routine part of their work habits.
- Considers new ideas and concepts and incorporates new methods where needed for better results.
- Ability to plan and execute specific, measurable, achievable, relevant, and time-bound (SMART) goals.

Functional Area 1: Personnel Management

Competency 1.7

Communicates with employees in a manner that promotes cooperation and reduces conflicts.

Knowledge

When Hired

- Knows techniques for dealing with difficult employees.

Advanced

- Knows policies and procedures for handling employee grievances.
- Knows district policies and procedures for disciplining employees.
- Knows techniques for conflict resolution.

Skills

When Hired

- Provides clear direction and communication of job expectations to school nutrition staff.
- Keeps employees informed through regular meetings and written and verbal communications.
- Uses feedback to improve communication among and with employees.
- Actively listens to employees and others to ensure understanding.
- Uses fair, constructive methods to correct employees and to resolve differences.

Advanced

- Applies techniques for dealing with difficult employees and seeks added assistance and expertise, when needed.
- Applies conflict resolution techniques to resolve problems between and with employees and other key personnel in the school and district.

Functional Area 1: Personnel Management

Competency 1.8

Maintains policies and procedures to ensure quality and timeliness of work meet and/or exceed productivity standards.

Knowledge

When Hired

- Knows how to organize work areas based upon job requirements for efficient work flow.
- Knows principles of work simplification.
- Knows principles of teamwork and techniques for applying it.
- Knows principles of effective delegation.

Advanced

- Understands the impact of cross-training employees to increase productivity.

Skills

When Hired

- Organizes work flow for efficient and prompt production and customer service.
- Assists employees with organizing work areas for efficient work flow and safety.
- Schedules equipment use for maximum efficiency.
- Utilizes time management techniques to ensure tasks are completed within time constraints.
- Organizes work flow for safe and efficient production and service.
- Plans work organization of staff so that job tasks are performed in proper sequence.
- Develops employee schedules to ensure maximum use of labor hours.
- Encourages employees to take individual responsibility for using sound financial practices in their work duties.
- Develops and posts employee work schedule regularly.

Advanced

- Implements a program of cross-training for all employees to increase productivity.
- Assists employees with learning and utilizing time management techniques.
- Guides staff to incorporate work simplification techniques into product tasks.

(Skills, Advanced, continued on next page, second column.)

Functional Area 1: Personnel Management

Advanced

- Evaluates menus for equipment/time requirements and personnel availability.
- Sets performance standards for employees.
- Schedules all duties fairly for maximum efficiency and employee productivity.
- Plans production schedules to effectively utilize resources and to coordinate activities of the foodservice staff.
- Maintains staffing appropriate to the required daily needs of the school nutrition program and plans for future demands.
- Applies principles of effective delegation to assign tasks, provide growth opportunities, and achieve objective.



Functional Area 2: Sanitation, Safety, and Security

This functional area is defined as the policies and procedures for protecting personnel and customers from disease, injury, or harm by maintaining sanitary conditions, a hazard-free and secure workplace, and implementing the HACCP-based food safety plan.

Core Competencies:

- Competency 2.1: Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.
- Competency 2.2: Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.
- Competency 2.3: Understands and implements Hazard Analysis and Critical Control Points (HACCP) and food safety practices in the school nutrition program.

Functional Area 2: Sanitation, Safety, and Security

Competency 2.1

Maintains sanitation, safety, and security practices in compliance with local, state, and federal policies, procedures, and regulations.

Knowledge

When Hired

- Knows federal, state, and local health code requirements for foodservice establishments.
- Knows principles of safety and sanitation for equipment, personnel, food, and foodservice facility.
- Knows procedures to prevent cross-contamination.
- Knows procedures for appropriate handling, storing, and disposing of garbage and refuse.
- Knows procedures for preventing contamination of equipment and utensils.
- Understands the value of a clean, pleasant dining environment.
- Knows district/school emergency/crisis management plan and knows the manager's role in the plan.

Skills

When Hired

- Monitors temperatures for receiving, storing, cooling, freezing, thawing, producing, cooking, and serving foods in the school nutrition program.
- Follows and enforces all safety regulations and guidelines.
- Monitors and enforces rules of health, cleanliness, personal habits, and proper clothing to ensure employees handling food are healthy.
- Works with the school nutrition administration to implement sanitation, safety, and security practices consistent with local, state, and federal requirements.
- Ensures school nutrition operations meet the health department code, and any deficiencies are corrected promptly.
- Posts health department inspection certificate prominently.
- Follows district procedures that meet food safety standards for handling, storing, and disposing of garbage and refuse.
- Follows district policies and procedures for reporting accidents and incident reports.
- Follows school/district crisis or emergency procedures.
- Maintains temperature logs in accordance to regulations for checking and recording temperatures of all storage units upon arrival each morning, and when leaving in the afternoon.

(Skills, When Hired, continued on next page, second column.)

Functional Area 2: Sanitation, Safety, and Security

When Hired

- Follows Department of Health Material Safety Data Sheets (MSDS) when handling cleaning products.
- Works with school nutrition administration and other officials to fulfill all federal and state responsibilities for food recalls.
- Maintains and implements standard operating procedures to identify and contain products when there is a food recall.
- Ensures all employees can operate department fire extinguishers.
- Maintains a list of emergency contact telephone numbers.
- Models proper lifting techniques.
- Implements and maintains system for preventing contamination of equipment and utensils.
- Calibrates food thermometers correctly and regularly to obtain accurate readings.
- Implements and monitors a regular cleaning and sanitizing schedule for food preparation areas, food contact surfaces, walls, floors, and equipment.
- Posts current emergency telephone numbers.
- Enforces rules of time and appropriate temperatures for food handling and preparation.
- Labels and stores chemicals and other hazardous materials separately from food products.
- Follows procedures for use of step ladders and other utilities/transport equipment.
- Operates fire extinguisher and determines the extinguisher to use on different types of fires.
- Implements security measures throughout the school nutrition operation and enforces compliance by all.
- Maintains a safe working environment.

(Skills, When Hired, continued on next page, second column.)



Functional Area 2: Sanitation, Safety, and Security

Advanced

- None

When Hired

- Provides an environment conducive to protecting the health and well-being of customers through high-level sanitation standards.
- Follows rules for storing other potentially hazardous materials and cleaning products in a separate area away from food products.

Advanced

- None

Functional Area 2: Sanitation, Safety, and Security

Competency 2.2

Maintains sanitation, safety, and security practices to protect the health and well-being of students, customers, and employees.

Knowledge

When Hired

- Understands causes and prevention of foodborne illness outbreaks.
- Knows principles of personal hygiene.
- Knows correct method for handwashing.
- Knows signs and symptoms of an adverse food reaction and/or an allergic reaction.
- Knows procedures for ensuring the safety of foods served to students with food allergies.
- Knows procedures for preventing cross-contamination of allergenic foods during storage, preparation, and service.
- Knows safe temperatures for receiving, storing, cooling, freezing, thawing, production, cooking, and serving foods in the school nutrition program.
- Knows procedures to protect food from deliberate tampering.
- Knows procedures to protect the security of personnel/customers in the school nutrition program.

Skills

When Hired

- Monitors and enforces employees' adherence to personal hygiene policies and procedures.
- Practices principles of good personal hygiene.
- Provides proper equipment, utensils, and training to prevent cuts and burns.
- Evaluates site routinely to ensure aisles, floors, and walkways are clear and in good condition to prevent trips and falls.
- Utilizes appropriate technology in safeguarding the safety of employees and the food served to students.
- Implements procedures for holding food at the correct temperature during serving periods.
- Implements a system for documentation of food temperatures during serving periods.
- Maintains daily temperature records for storage areas, refrigeration/freezer equipment, and dishwashing equipment.
- Ensures corrective action for deviations from required temperatures are implemented and recorded promptly.
- Maintains cleaning procedures to ensure storage areas are clean, dry, and free from infestation at all times.
- Prohibits entry of unauthorized individuals in the food preparation, receiving, and storage areas.

Functional Area 2: Sanitation, Safety, and Security

Advanced

- None

Advanced

- None

Competency 2.3

Understands and implements Hazard Analysis and Critical Control Points (HACCP) and food safety practices in the school nutrition program.

Knowledge

When Hired

- Knows the Hazard Analysis and Critical Control Points (HACCP)-based food safety plan for the school nutrition program.
- Knows procedures to eliminate hazards and minimize risks of foodborne illnesses.

Advanced

- None

Skills

When Hired

- Implements and incorporates Hazard Analysis and Critical Control Points (HACCP) principles into the management of the school nutrition program-based food safety plan.
- Reports safety hazards immediately and ensures hazards are removed or corrected.
- Implements a system for following Hazard Analysis and Critical Control Points (HACCP) rules for safety and sanitation when storing food.
- Ensures controls are in place to store and maintain all foods at appropriate temperatures.

Advanced

- None

Functional Area 2: Sanitation, Safety, and Security

Functional Area 3: Facility and Property Management

This functional area is defined as the maintenance of an organization's foodservice facility and equipment and the coordination of the physical environment with personnel and work of the program.

Core Competencies:

- Competency 3.1: Understands and follows policies and procedures that promote and protect facility/property functions and services.
- Competency 3.2: Follows district policies related to equipment operation, safety, and maintenance practices.
- Competency 3.3: Uses preventive maintenance and equipment management practices to create a safe work environment.
- Competency 3.4: Implements energy and resource conservation practices for managing equipment and the school nutrition facility.

Functional Area 3: Facility and Property Management

Competency 3.1

Understands and follows policies and procedures that promote and protect facility/property functions and services.

Knowledge

When Hired

- Knows how to work with administrators to implement facility and property management practices consistent with local, state, and federal requirements.
- Knows health department inspection standards.
- Knows how to identify facility and property deficiencies, and how to implement corrective action promptly.

Advanced

- Knows all applicable federal, state, and local regulations relating to facility and property.

Skills

When Hired

- Ensures facility and equipment meet health department inspection standards, and corrects any deficiencies needed.

Advanced

- Works with school nutrition administration to implement facility and property management practices consistent with local, state, and federal requirements.
- Follows district policies and procedures for equipment repair and replacement.

Functional Area 3: Facility and Property Management

Competency 3.2

Follows district policies related to equipment operation, safety, and maintenance practices.

Knowledge

When Hired

- Knows who to contact in the event of emergency repairs to the facility and equipment.
- Knows district’s policy on the uses of equipment by outside entities.

Advanced

- Knows district policies and procedures for equipment replacement.

Skills

When Hired

- Implements a system of security measures to prevent loss, theft, and pilferage.
- Inspects the school nutrition facility for safety hazards.
- Monitors temperature logs of refrigeration/freezer equipment twice a day to ensure proper operation.
- Maintains a current list of contacts and telephone numbers for emergency repairs to the facility and equipment.

Advanced

- None

Functional Area 3: Facility and Property Management

Competency 3.3

Uses preventive maintenance and equipment management practices to create a safe work environment.

Knowledge

When Hired

- Knows how to access manufacturers' directions for equipment use, cleaning, and maintenance.
- Knows how to develop and implement a master cleaning schedule for the school nutrition facility and all equipment.
- Knows how to inspect the school nutrition facility and equipment daily to ensure cleanliness and safe working condition.

Advanced

- None

Skills

When Hired

- Follows manufacturers' directions for equipment use, cleaning, and maintenance.
- Develops and implements a cleaning schedule for the kitchen and ensures the dining areas are always clean.
- Works with custodians to make sure dining areas are always clean.
- Develops, implements, and monitors the master cleaning schedule for the school nutrition facility and all equipment.
- Follows district policies and procedures for pest control in the school nutrition facility.
- Inspects facility and equipment daily to ensure cleanliness and proper working condition.
- Maintains a good working relationship with the school maintenance department.
- Ensures all fire extinguishers are workable, and ensures inspections are up to date.

Advanced

- Implements a preventive maintenance program for the school nutrition facility and equipment.
- Maintains records of equipment maintenance and repair according to recommended equipment manual/guidelines.
- Recommends new equipment purchases to district administrator.

(Skills, Advanced, continued on next page, second column.)

Functional Area 3: Facility and Property Management

Advanced

- Develops an equipment replacement plan.
- Maintains operation of all school nutrition equipment.



Competency 3.4

Implements energy and resource conservation practices for managing equipment and the school nutrition facility.

Knowledge

When Hired

- None

Advanced

- Understands energy conservation measures in managing the school nutrition facility and equipment.
- Knows available recycling programs, as applicable.

Skills

When Hired

- None

Advanced

- Applies energy conservation practices in managing the school nutrition facility and equipment.
- Participates in available recycling programs, as applicable.

Functional Area 3: Facility and Property Management

Functional Area 4: Marketing, Communication, and Customer Service

This functional area is defined as the promotion of products, services, and the activities involved in the education of others about the mission, work, and value of the school nutrition program. These objectives are fostered through a focus on the effective exchange of information and ideas and servicing the needs and desires of their customers.

Core Competencies:

- Competency 4.1: Promotes a school environment that fosters positive social interaction and promotes healthy eating behaviors.
- Competency 4.2: Develops and implements best practices for providing and maintaining a quality dining experience.
- Competency 4.3: Implements customer service techniques to promote satisfaction.
- Competency 4.4: Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.

Functional Area 4: Marketing, Communication, and Customer Service

Competency 4.1

Promotes a school environment that fosters positive social interaction and promotes healthy eating behaviors.

Knowledge

When Hired

- Knows school nutrition regulations regarding signage.

Advanced

- Knows the importance of marketing school nutrition programs.
- Knows how to increase awareness of the school nutrition program's benefits.
- Knows how to develop a school site marketing plan to increase participation in the school meals program.
- Knows how to use technology to promote nutritious school meals, when applicable.

Skills

When Hired

- Uses established marketing techniques to improve customer awareness of the program.
- Uses school menus as a marketing tool.
- Implements school district marketing plan at the school site, when appropriate.
- Implements the school district's plans to promote special events.
- Maintains a copy of the current local school wellness policy, as appropriate.
- Communicates with school officials regarding requests from staff for menus planned around special school occasions.
- Promotes the school nutrition program to students, staff, parents, and the community.
- Displays signage to identify what foods constitute a unit-priced reimbursable meal at the beginning of the serving line when offer-versus-serve (OVS) is implemented.

Advanced

- Uses marketing to encourage healthy food choices.
- Creates promotional activities that motivate and support student well-being.
- Collaborates with other departments and individuals at the school site and within the district, as appropriate.

(Skills, Advanced, continued on next page, second column.)

Functional Area 4: Marketing, Communication, and Customer Service

Advanced

- Works with the school nutrition administration to implement a marketing plan for the school nutrition program to create an atmosphere that attracts all potential customers including students, teachers, administrators, and other support staff.
- Utilizes available technology for marketing and communication of school nutrition programs.



Competency 4.2

Develops and implements best practices for providing and maintaining a quality dining experience.

Knowledge

When Hired

- Knows how to establish a customer-friendly and responsive environment in the school nutrition program.
- Knows the importance of creating a student-friendly environment with healthy food, clean serving lines, and helpful employees to improve participation in the school nutrition program.

Advanced

- None

Skills

When Hired

- Provides a school nutrition environment that projects a positive message about the meals served and their nutritional value.
- Coordinates facilities and services with outside groups when authorized by school officials.
- Maintains an attractive dining area, decorated appropriately.

Advanced

- Uses merchandising techniques to improve customer nutrition choices and practices.
- Assists the school community in hosting special events that feature the school cafeteria, if applicable.
- Recommends improvements for the dining environment to encourage student participation.

Functional Area 4: Marketing, Communication, and Customer Service

Competency 4.3

Implements customer service techniques to promote satisfaction.

Knowledge

When Hired

- Knows customer expectations for the school nutrition program at the school level site.
- Knows the importance of providing excellent customer service.

Skills

When Hired

- Meets and exceeds customer expectations for the school site's nutrition program.
- Trains staff to remain alert to factors that affect customer satisfaction.
- Encourages school nutrition staff to be helpful and supportive of student customers.
- Responds immediately to customers' and parents' complaints and works to resolve issues.
- Organizes work flow for efficient and prompt production and customer service.
- Involves school administrators and faculty in promoting special school events such as grandparent's day, contests, and theme days as a part of marketing and customer service efforts.
- Serves as a model for customer-service oriented school nutrition staff.
- Demonstrates professionalism in working with school nutrition program customers.
- Serves as a role model to other school nutrition staff to help create a customer-friendly environment.
- Responds to customer suggestions and comments in a pleasant and positive manner.
- Develops a process to get feedback from customers about their preferences and expectations.
- Discusses ways to improve customer satisfaction with other staff members.

Functional Area 4: Marketing, Communication, and Customer Service

Advanced

- Knows key factors that contribute to customer satisfaction of students who participate, or could participate, in the school nutrition program.
- Knows the importance of collecting data on customer acceptability of school menus.

Advanced

- Collects students' and other customers' comments about the school nutrition program.
- Uses nutrition education materials in the cafeteria and on the serving line to promote an awareness of healthy school meals.



Competency 4.4

Utilizes communication techniques to share nutrition education information with students, teachers, and administrators.

Knowledge

When Hired

- Knows the importance of proper nutrition and the nutrition environment as an integral part of educating children.
- Knows the importance of working with school principal and faculty.

Advanced

- None

Skills

When Hired

- Encourages students to make wise food choices that result in healthy, well-balanced meals.
- Provides menu maker with students' comments regarding menu item likes and dislikes, new food items served, and menu changes.
- Encourages customers to select a variety of foods.
- Works with school district and officials to provide daily/monthly menus to students, if applicable.
- Communicates effectively with employees, supervisors, school administration, parents, students, other school employees, and the public, as appropriate.
- Communicates the school district policy for fundraising.

Advanced

- Shares nutritional information with students, parents, and faculty about nutrient content of food served in the school meals.
- Communicates with customers to determine what influences their eating habits.
- Presents pertinent school nutrition information, when appropriate, at school or community meetings.

(Skills, Advanced, continued on next page, second column.)

Functional Area 4: Marketing, Communication, and Customer Service

Advanced

- Works with stakeholders to generate support for federal, state, and local policies beneficial to the health and education of children.
- Assists teachers, school administrators, and parents with nutrition education resources.



Functional Area 5: Procurement and Inventory Management

This functional area is defined as the system for obtaining and accounting for quality goods and services in correct amounts at the right time. Procurement activities include inventorying, forecasting, ordering, storing, and protecting the safety and quality of the products.

Core Competencies:

- Competency 5.1: Utilizes forecasting methods to ensure adequate quantities of food are purchased.
- Competency 5.2: Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.
- Competency 5.3: Follows approved federal, state, and local regulations for utilizing and serving United States Department of Agriculture (USDA) Foods.
- Competency 5.4: Follows proper procedures for receiving food and supplies.
- Competency 5.5: Follows procedures to ensure that appropriate storage and issuing techniques are implemented.

Functional Area 5: Procurement and Inventory Management

Competency 5.1

Utilizes forecasting methods to ensure adequate quantities of food are purchased.

Knowledge

When Hired

- Knows forecasting methods to order accurate amounts of food and supplies.

Advanced

- None

Skills

When Hired

- Utilizes effective forecasting methods to determine the amount of food and supplies to order.
- Utilizes production records as a source of information for past and current usage of food and supplies.
- Plans for and utilizes leftovers when forecasting amounts of food and supplies to order.

Advanced

- None

Functional Area 5: Procurement and Inventory Management

Competency 5.2

Conducts procurement procedures that follow federal, state, and local school purchasing guidelines.

Knowledge

When Hired

- Knows the importance of checking inventory before ordering.

Advanced

- Knows the managers' responsibilities for ordering, receiving, storing, and conducting inventory of products for the school nutrition program.
- Knows the federal, state, and local school purchasing guidelines.
- Knows how to use the Food Buying Guide and other credible resources to determine the quantity of food to order.

Skills

When Hired

- Uses historical data and standardized recipes to determine the amount of food to order.
- Uses standardized recipes to calculate amount of food to order for the schools and to prepare menu items.
- Uses product descriptions when ordering food to ensure the correct menu items are ordered and received.
- Participates in the district's product screening and brand approval activities, as appropriate.
- Communicates with school nutrition administration regarding approved product list to ensure correct product is ordered based on contract terms.
- Utilizes product specifications for case/serving size when calculating amounts to order.

Advanced

- Works with school nutrition administration to implement procurement practices consistent with local, state, and federal requirements.

Functional Area 5: Procurement and Inventory Management

Competency 5.3

Follows approved federal, state, and local regulations for utilizing and serving United States Department of Agriculture (USDA) Foods.

Knowledge

When Hired

- None

Advanced

- Knows policies and procedures for the use of USDA Foods.

Skills

When Hired

- Follows approved federal, state, and local guidelines for conducting an inventory of purchased food and USDA Foods.

Advanced

- Utilizes inventory when determining quantities for purchased food and/or USDA Foods.

Functional Area 5: Procurement and Inventory Management

Competency 5.4
Follows proper procedures for receiving food and supplies.

Knowledge

When Hired

- Knows policies and procedures for receiving and accepting products delivered to the school nutrition program.
- Knows the importance of checking prices and price extensions to verify accuracy of invoice.

Advanced

- None

Skills

When Hired

- Trains employees to understand the value of accurate and complete specifications to ensure that products are delivered and received correctly and as specified.
- Follows district procedures for receiving products to verify that quantities, prices, and specified items conform to the order placed.
- Follows procedures for inspecting merchandise for damage, signs of contamination, and/or improper temperature upon delivery.
- Follows district procedures for returning and crediting unacceptable product.
- Verifies no unauthorized substitutions are delivered.
- Follows school district policies and procedures for documenting variations between purchase order and invoice/delivery ticket.
- Retains a copy of the order form and invoice at the product check-in point to verify products delivered are the products ordered.

Advanced

- None

Functional Area 5: Procurement and Inventory Management

Competency 5.5

Follows procedures to ensure that appropriate storage and issuing techniques are implemented.

Knowledge

When Hired

- Knows the importance of secure, efficient, and safe storage areas.
- Knows procedures for securing storage areas from theft and food tampering.
- Knows district standard operating procedures (SOP) for dating and using products to reflect first-in, first-out (FIFO).
- Knows importance of maintaining an accurate record of products used.
- Knows how and when to delegate responsibility for inventorying to staff members.
- Knows the importance of rotating stock when issuing food from the storage areas.

Advanced

- Knows effective inventory procedures for managing the flow of products from storage to the serving line.
- Knows physical and perpetual methods of recording food products and supplies in inventory and knows when to use each method.

Skills

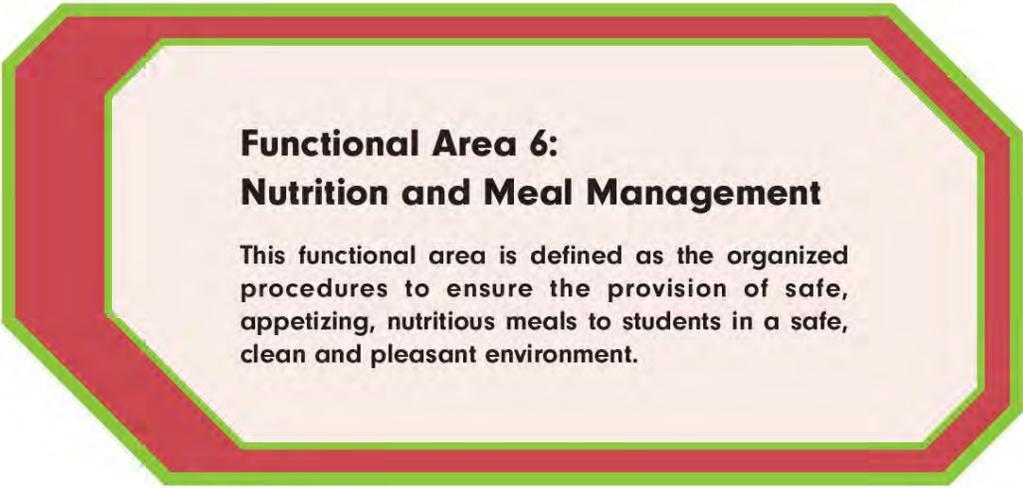
When Hired

- Ensures all food products are dated when entered into storage and/or inventory software.
- Develops and implements a system for placing items in the storage areas.
- Monitors use of storeroom space and ensures adequate ventilation and lighting.
- Follows best practices when taking physical inventory (i.e., one person counts and another person records).
- Ensures consistency in inventory practices such as tracking units or cases.
- Implements a stock rotation system such as first-in, first-out (FIFO) in accordance with district policies and procedures.
- Ensures an adequate inventory is available for all meal services and extra food sales.

Advanced

- Maintains the school's written policies for procedures to transfer food in case of equipment failure or natural disaster.
- Implements effective use of district technology when conducting/tracking inventory, if applicable.
- Follows district guidelines for maintaining food and supply items in inventory to be available for use in case of an emergency.

Functional Area 5: Procurement and Inventory Management

A graphic with a red and green border containing text about Functional Area 6: Nutrition and Meal Management.

Functional Area 6: Nutrition and Meal Management

This functional area is defined as the organized procedures to ensure the provision of safe, appetizing, nutritious meals to students in a safe, clean and pleasant environment.

Core Competencies:

- Competency 6.1: Ensures all meals in the school nutrition program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.
- Competency 6.2: Follows school nutrition program guidelines for serving and offering meal components to students.
- Competency 6.3: Follows federal, state, and local guidelines and regulations for addressing special dietary needs in the school nutrition program.

Functional Area 6: Nutrition and Meal Management

Competency 6.1

Ensures all meals in the school nutrition program are prepared in compliance with federal, state, and local nutrition and wellness regulations, policies, and procedures.

Knowledge

When Hired

- Knows responsibilities of the school nutrition manager in implementing nutrition standards.
- Knows the importance of using standardized recipes to ensure nutritional requirements are met.

Advanced

- Knows current USDA standards and regulations that apply to all meals served in the school nutrition program.
- Knows laws and regulations for compliance with nutrition objectives in school meals.
- Knows local wellness policy requirements related to food and nutrition.
- Knows federal, state, and local rules governing competitive food sales.
- Knows federal, state, and local policies and procedures regarding meal substitutions.

(Knowledge, Advanced, continued on next page, first column.)

Skills

When Hired

- Implements menu offerings to ensure compliance with USDA regulations.
- Follows district guidance in using cycle menus, if applicable.
- Maintains documentation to support the Smart Snacks requirements for all items sold by the school nutrition program.
- Maintains documentation of all non-program food sold.
- Utilizes standard recipes to ensure nutritional requirements are met.

Advanced

- Ensures use of nutritionally-equivalent foods when menu substitutions are necessary.
- Implements current local, state, and federal standards and regulations that meet school nutrition program requirements.
- Implements best practices to meet wellness policy requirements related to food and nutrition.
- Maximizes use of technology to improve menu management, as applicable.
- Implements federal, state, and local regulations regarding competitive foods.
- Ensures all meals served meet nutritional requirements for reimbursement.

(Skills, Advanced, continued on next page, second column.)

Functional Area 6: Nutrition and Meal Management

Advanced

- Knows how to use Child Nutrition (CN) labels or product formulation statements for crediting food items, if applicable.
- Knows USDA guidelines for making substitutions in the planned menu, if necessary.
- Knows the meal pattern requirements for various age/grade groups.
- Knows the importance of adjusting the forecast of meals to prepare in special situations such as weather conditions or field trips.
- Knows the role of forecasting in controlling under- and over-production.

Advanced

- Utilizes USDA guidelines for making menu substitutions, when necessary.
- Adjusts forecasted needs for meals to address special situations.

Competency 6.2

Follows school nutrition program guidelines for serving and offering meal components to students.

Knowledge

When Hired

- Knows appropriate portion sizes that meet meal pattern requirements.
- Knows regulations for implementing offer-versus-serve (OVS) in school nutrition programs.
- Knows the minimum quantities of food components/items to offer daily.

Advanced

- Knows locations of resources to assist school staff in identifying and serving reimbursable meals.
- Knows USDA requirements for recording food item contributions.

Skills

When Hired

- Follows guidelines for implementing school nutrition program meal patterns.
- Ensures students are offered all three required food components, in at least the minimum required amounts, at breakfast.
- Ensures students are offered all five required food components, in at least the minimum required amounts, at lunch.
- Monitors access to drinking water in the school cafeteria.
- Ensures the minimum quantities of food components/items are offered daily as a part of the school nutrition program.

Advanced

- None

Functional Area 6: Nutrition and Meal Management

Competency 6.3

Follows federal, state, and local guidelines and regulations for addressing special dietary needs in the school nutrition program.

Knowledge

When Hired

- None

Advanced

- Knows the sources of guidance for, and importance of, a team approach for addressing general food and nutrition needs of all children, including children with special dietary needs.
- Knows how to follow a medical authorization to modify meals for a child with special needs.
- Knows district policies and procedures for serving children with special needs.

Skills

When Hired

- Ensures applicable policies are followed when providing school meals for children with special needs.
- Implements district policies and procedures for ensuring that students with food allergies/special needs are served correctly.

Advanced

- Works with health professionals in providing meals to students with special dietary needs.

Functional Area 6: Nutrition and Meal Management

Functional Area 7: Financial Management and Accountability

This functional area is defined as the effective and efficient management of funds and resources utilized to meet program goals and objectives. The program demonstrates accountability by fulfilling the responsibilities of accurately recording and reporting records of program activities, resources, reports, and documents.

Core Competencies:

- Competency 7.1: Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the school nutrition program.
- Competency 7.2: Utilizes technology to support financial accountability needs in the school nutrition program.
- Competency 7.3: Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.
- Competency 7.4: Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.
- Competency 7.5: Follows cost controls for the school nutrition program.
- Competency 7.6: Develops and monitors financial reports and accounts for the school nutrition program.

Functional Area 7: Financial Management and Accountability

Competency 7.1

Ensures compliance with federal, state, and local regulations, policies, and procedures for financial accountability in the school nutrition program.

Knowledge

When Hired

- Knows school district policies and procedures for meal charging.
- Knows approved policies and procedures for providing free- and reduced-price meal benefits.

Advanced

- Knows financial elements of the school nutrition program (i.e., average daily participation [ADP] and food costs).
- Knows local, state, and federal laws pertaining to records and document retention.
- Knows federal, state, and local regulations for providing services and using USDA Foods in an emergency.
- Understands school nutrition program financial goals and objectives.

Skills

When Hired

- Identifies reimbursable meals and understands their impact on the financial status of the school nutrition program.
- Monitors pre-paid students' accounts and notifies parents of the status of students' accounts.
- Maintains program integrity and accountability regarding meal requirements and documentation.
- Ensures implementation of all policies and procedures regarding students receiving free- or reduced-price meal benefits.
- Follows the school district guidance regarding meals charged policy.
- Reviews and maintains a current policy and procedures manual for the school nutrition program.

Advanced

- Assists parents/guardians with the completion of free- and reduced-price meal applications, if applicable.
- Maintains documentation, if applicable, that shows families are informed about the availability of reimbursable meals served under the National School Breakfast Program (NSBP) and National School Lunch Program (NSLP).
- Shares school nutrition program financial goals and objectives with employees.

(Skills, Advanced, continued on next page, second column.)

Functional Area 7: Financial Management and Accountability

Advanced

- Works with school nutrition administrators to implement financial management and accountability practices consistent with local, state, and federal requirements.
- Maintains records and supporting documentation in accordance with federal, state, and local regulations and policies.
- Follows school district policies and procedures for charging for in-kind meals, earned meals, and other unusual meal payments.
- Follows school district policies and procedures for addressing security and theft in the kitchen, storage, serving, and dining areas.
- Ensures crediting documentation is complete for all meal components/food items, as applicable.
- Maintains Child Nutrition (CN) labels or Product Formulation Statements for items that cannot be credited using the Food Buying Guide, as applicable.



Competency 7.2

Utilizes technology to support financial accountability needs in the school nutrition program.

Knowledge

When Hired

- Knows how to use contingency plans in the event of point-of-service (POS) hardware and/or software failure during meal service.

Advanced

- Knows how to utilize technology to monitor, analyze, and report financial information, if applicable.

Skills

When Hired

- Follows contingency plans in the event of point-of-service (POS) hardware and/or software failure during meal service.

Advanced

- Uses technology to monitor, analyze, and report financial information, if applicable.

Functional Area 7: Financial Management and Accountability

Competency 7.3

Utilizes cash management procedures to safeguard handling of cash and meal benefit identifiers.

Knowledge

When Hired

- Knows procedures for identifying a student as paid, reduced, or free meal eligibility.
- Knows district policies and procedures for secure cash management.

Advanced

- None

Skills

When Hired

- Maintains confidentiality of student information and transactions.
- Collaborates with school district administrator and school site principal to develop a system for payment of unpaid charges.
- Monitors and audits cashier operations and cash reconciliation regularly.
- Follows district policies and procedures for bank deposits.
- Oversees cashiering activities involving the collection of monies and recording of daily receipts.
- Identifies problems/differences in the meal count/collection system for consolidation of line meal counts and cash collections.
- Monitors and enforces procedures to safeguard cash and meal benefit identifiers from loss, theft, or misuse.

Advanced

- None

Functional Area 7: Financial Management and Accountability

Competency 7.4

Organizes effective business operations to ensure all records and management techniques are maintained in accordance to federal, state, and local regulations and policies.

Knowledge

When Hired

- Knows procedures for documenting and evaluating amounts of food planned, prepared, and served.
- Knows basic mathematical operations.
- Knows the importance of operating a financially sound program.

Advanced

- Knows school nutrition program financial goals and objectives.
- Understands the value of technology in school nutrition financial management and accountability.

Skills

When Hired

- Ensures daily participation records are accurate.
- Ensures that there is no overt identification of student eligibility by other students or staff.
- Follows approved procedures for counting and claiming reimbursable meals.
- Maintains list of emergency contact telephone numbers.

Advanced

- Organizes and manages the functions of the local program to maintain a fiscally sound operation.
- Uses a team approach to encourage employee application of sound financial practices.
- Utilizes USDA Foods to maximize cost savings.
- Tracks expenses and revenue on a regular basis to better forecast future needs.

Functional Area 7: Financial Management and Accountability

Competency 7.5

Follows cost controls for the school nutrition program.

Knowledge

When Hired

- Knows district internal controls to assure meal counts are accurate.
- Knows the importance of accurate counting and claiming of reimbursable meals using approved methods.
- Knows the importance of meal costs on the financial status of the school nutrition program.

Skills

When Hired

- Uses the food production record to document the amount of each menu item served to age/grade groups daily.
- Maintains documentation, such as production records, to show nutritional requirements and meal patterns are met daily.
- Records planned and actual number of portions for each menu item served, according to contribution size for age/grade groups.
- Monitors all in-kind meals when documenting number of menu items planned and served.
- Monitors point-of-service (POS) meal count to ensure only one meal, per eligible student, per meal service, is claimed for reimbursement.
- Ensures accurate consolidation of meal counts from various service lines, if applicable.
- Implements a system of internal controls to reduce theft by employees and students.
- Develops a system for controlling keys and access to product storage areas.
- Implements the meal count/collection system to ensure that no overt identification of free- or reduced-price meal recipients occurs.
- Utilizes basic math skills accurately in all calculations needed in managing the school nutrition program.

Functional Area 7: Financial Management and Accountability

Advanced

- Knows cost-effective techniques relevant to school nutrition operations.
- Knows the financial impact of cost saving production techniques.
- Knows how to calculate meals per labor hour and the significance of the results.

Advanced

- Ensures meal benefit documentation is up-to-date in point-of-service (POS) system, if applicable.
- Monitors attendance and adjusts or checks on each school's daily meal count for accuracy, if applicable.
- Operates a financially sound, cost-effective school nutrition program of high integrity.
- Reviews monthly financial reports to ensure that labor, food, and/or supply costs are within targeted ranges.
- Implements a system of cost control measures throughout the school nutrition program.
- Utilizes the profit and loss statement to assist in better financial decision-making.
- Evaluates free- and reduced-price applications to determine eligibility for benefits, if applicable.
- Calculates and utilizes meal-per-labor hour to monitor employee productivity and to assist in efficient staffing.
- Conducts random checks of financial activities and records, if applicable.
- Uses approved procedures to identify potential problems in the meal count system at the site level.

Competency 7.6

Develops and monitors financial reports and accounts for the school nutrition program.

Knowledge

When Hired

- Understands the importance of accurate, current, and complete records to document school nutrition financial accountability.
- Understands the requirements and approved methods for completing financial reports.
- Knows the types of information and acceptable methods for preparing food production records as required for compliance with federal and state regulations.
- Understands the importance of complete and accurate records and documentation.

Advanced

- Knows procedures for counting and claiming school meals at the point-of-service (POS).

Skills

When Hired

- Ensures meal counts are completed and consolidated daily.
- Applies basic math skills to prepare accurate and complete financial reports.
- Ensures proper documentation is maintained for a food recall.
- Maintains production records in an accurate manner to provide an audit trail for administrative review.
- Reconciles point-of-service (POS) records daily.
- Maintains accurate production records of planned menus, menu components, amount of food produced, food served, and food discarded.
- Ensures accurate meal eligibility category is confirmed at the point-of-service (POS).
- Identifies and appropriately counts adult meals, second meals, or other non program foods sold.
- Maintains and monitors required program and employee records and documents for accuracy and completeness according to district policies and procedures.

Advanced

- Maintains documentation that supports the number of afterschool program snacks served daily and claimed, if applicable.

(Skills, Advanced, continued on next page, second column.)

Functional Area 7: Financial Management and Accountability

Advanced

- Presents accurate, complete financial reports regularly to the district supervisor and other interested parties.
- Maintains accurate and complete records of all USDA Foods and food items purchased.

Functional Area 8: Meal Preparation and Service

This functional area is defined as the organized procedures to ensure the provision and service of safe, appetizing, nutritious meals to students in a safe, clean and pleasant environment.

Core Competencies:

- Competency 8.1: Follows federal, state, and local policies and procedures to meet compliance requirements for meal preparation and service in the school nutrition program.
- Competency 8.2: Follows standard recipes that meet the requirements of the school nutrition program.
- Competency 8.3: Organizes food preparation and production that allows for efficient and effective use of equipment.
- Competency 8.4: Follows policies and procedures for maintaining food production records for the school nutrition program.
- Competency 8.5: Creates and utilizes production planning and scheduling procedures in the school nutrition program to produce quality foods.
- Competency 8.6: Implements foodservice procedures that produce high quality food that is appealing for the school nutrition program.

Functional Area 8: Meal Preparation and Service

Competency 8.1

Follows federal, state, and local policies and procedures to meet compliance requirements for meal preparation and service in the school nutrition program.

Knowledge

When Hired

- Knows how to appropriately implement offer-versus-serve (OVS) properly, if applicable.
- Knows the menu items/components that meet USDA meal requirements that are available to students throughout the meal service.
- Knows district policies and procedures for the preparation of foods for students with allergies/special needs.
- Knows high standards for quality food production in all school nutrition programs.
- Knows how to follow written medical diets and instructions on file.

Advanced

- Knows how to use herbs and spices to enhance flavor when using less salt/sodium.
- Knows effective use of USDA Foods.

Skills

When Hired

- Ensures offer-versus-serve (OVS) is being implemented properly, if applicable.
- Ensures menu items/components that meet USDA meal requirements are available to students throughout meal service.
- Maintains high standards for quality of food production in all school nutrition programs.
- Follows school district policies and procedures for the preparation of foods for students with allergies/special needs.
- Keeps written medical diets and instructions on file.

Advanced

- Incorporates the use of herbs and spices to enhance flavor when using less salt/sodium.
- Ensures effective use of USDA Foods.

Functional Area 8: Meal Preparation and Service

Competency 8.2

Follows standardized recipes that meet the requirements of the school nutrition program.

Knowledge

When Hired

- Knows how standardized recipes ensure the production of quality food.

Advanced

- Knows how to standardize new recipes for site level operations, as applicable.
- Knows the importance of using accepted methods when making recipe adjustments for the number of customers served.

Skills

When Hired

- Ensures that standardized recipes are not modified without appropriate approval.
- Enforces the use of standardized recipes to reduce waste and to control food quality.
- Uses only tested and standardized recipes in the production of food for the school nutrition program.

Advanced

- Adjusts ingredient quantities in standardize recipes to yield planned number of servings.

Functional Area 8: Meal Preparation and Service

Competency 8.3

Organizes food preparation and production that allows for efficient and effective use of equipment.

Knowledge

When Hired

- Knows how to calibrate scales to ensure accuracy of weights.
- Knows correct procedures, techniques, and tools to use in weighing and measuring ingredients for food preparation.
- Knows how to maintain the correct equipment and tools for controlling portions of food items served to students.

Advanced

- None

Skills

When Hired

- Maintains a supply of the correct equipment and tools for controlling portions of food items served to students.
- Ensures ingredients are measured using correct procedures, techniques, and tools.
- Demonstrates how weights and measures are used in recipes to ensure quality foods.
- Demonstrates how to calibrate scales to ensure accuracy in weighing.

Advanced

- None

Functional Area 8: Meal Preparation and Service

Competency 8.4

Follows policies and procedures for maintaining food production records for the school nutrition program.

Knowledge

When Hired

- Knows how to utilize production records as a tool for food preparation and service.

Advanced

- Knows about over- and under-production of food and knows how to implement corrective action.
- Knows how to utilize various procedures for evaluation of prepared food.

Skills

When Hired

- Develops and/or utilizes a system for reviewing over- and under-production of food and implementing corrective action.
- Uses production records as a tool for food preparation and service.
- Utilizes accepted procedures for evaluation of food prepared.
- Monitors food production to reduce waste from over-production.

Advanced

- None

Functional Area 8: Meal Preparation and Service

Competency 8.5

Creates and utilizes production planning and scheduling procedures in the school nutrition program to produce quality foods.

Knowledge

When Hired

- Knows standards for preparing, holding, distributing and serving food in volumes that maintain nutrition and food quality.
- Knows common measures used in the production of food products.
- Knows food preparation techniques that allow for efficient use of product, labor, and equipment.
- Knows principles of pre-planning, planning, and scheduling food production to maximize efficient use of time and equipment.
- Knows the importance of production scheduling for optimum holding of food items.

Advanced

- Knows the impact of operational influences and resources on food production (e.g., physical facilities, equipment constraints, personnel skills, and schedules).

Skills

When Hired

- Monitors preparation techniques to ensure the yield of high-quality food.
- Utilizes historical data, trends, and standardized recipes to forecast the number of servings needed for each menu item served daily.

Advanced

- Suggests changes to menu planner for menus and preparation techniques.

Functional Area 8: Meal Preparation and Service

Competency 8.6

Implements foodservice procedures that produce high quality food that is appealing for the school nutrition program.

Knowledge

When Hired

- Understands the value of a clean, pleasant, dining environment.
- Knows the importance of monitoring food production daily to ensure quality of food served.
- Knows how preparation techniques influence the quality of food products.
- Knows time and temperature relationships associated with the appearance and palatability of food.
- Knows meal service principles that enhance serving line operations.
- Knows food quality standards to use in evaluating finished meal items.
- Knows the fundamentals of creating a pleasant, appealing, and safe environment for serving customers nutritious meals.
- Knows basic rules for setting up a service line.
- Knows the importance of serving food attractively without spills.

Advanced

- Knows key elements of food presentation to increase eye appeal and student acceptance of food served.

Skills

When Hired

- Ensures all menu items are prepared to preserve nutrients and to encourage meal consumption.
- Maintains a pleasant, safe, and clean physical environment in the school cafeteria to encourage student participation.
- Ensures the aesthetic qualities of menu items are maintained throughout the meal period.
- Establishes food preparation procedures to conserve the nutritive value, to enhance flavor/attractiveness, and to promote freshness of the final product.
- Monitors the service line to see that it moves smoothly.

Advanced

- Identifies various techniques to display food for the school nutrition program.
- Ensures food items are served to maintain quality and appearance standards.

Application Tools

This resource was developed to aid school nutrition (SN) directors and managers in identifying the necessary knowledge and skills required for an effective SN manager in the 21st century. The competencies, knowledge, and skills statements were written to address both the fundamental knowledge, skills and abilities necessary when hired, and also the skills needed at advanced stages in an SN manager's career.

This section of the document can help individuals utilize the information shared regarding the competencies, knowledge, and skills to address personal and program needs. Included in the Application Tools section are the following: a job description template (as a fillable form), an individual mentoring plan for SN managers, and a competency-based performance appraisal (as a fillable form). This part of the document is designed to assist both the SN director and the SN manager in accomplishing the following tasks:

- Create job descriptions based on the competencies, knowledge, and skills addressed within the resource;
- Identify training needs of SN managers working in the local SN program;
- Create targeted learning opportunities;
- Evaluate local SN managers job performance in three different time periods – probationary, annual, and reappraisal; and
- Establish mentoring relationships among managers and directors.

Each tool has detailed instructions on its usage and on how to complete the document. To allow for ease of use, the full version of each tool shown in the Application Tools section has been embedded in electronic version of this resource. Use the hyperlink below to access the Word documents for each tool shared:

<https://theicn.org/icn-resources-a-z/competencies-knowledge-and-skills-for-school-nutrition-managers>



Competency-Based Job Description

Position Information			
Position Title:	Click or tap here to enter text.	Position Type:	Choose an item.
Location:	Click or tap here to enter text.	Date Posted:	Click or tap to enter a date.
Level/Salary Range:	Click or tap here to enter text.	Closing Date	Click or tap to enter a date.
Qualifications			
Education		Emphasis/Major (If Applicable)	Preferred/Required
High School Degree or GED		N/A	Choose an item.
Associates Degree		Choose an item.	Choose an item.
Bachelor's Degree		Choose an item.	Choose an item.
Master's Degree		Choose an item.	Choose an item.
Other: Click or tap here to enter text.		Choose an item.	Choose an item.
Work Experience		Years of Experience	Preferred/Required
School Nutrition		Choose an item.	Choose an item.
School Nutrition Management District Level		Choose an item.	Choose an item.
School Nutrition Management School/Unit Level		Choose an item.	Choose an item.
Food Service		Choose an item.	Choose an item.
Food Service Management		Choose an item.	Choose an item.
Other: Click or tap here to enter text.		Choose an item.	Choose an item.
Credentials		Preferred/Required	
Serve-Safe		Choose an item.	
Registered Dietitian		Choose an item.	
School Nutrition Specialist (SNS)		Choose an item.	
SNA Level 1		Choose an item.	
SNA Level 2		Choose an item.	
SNA Level 3		Choose an item.	
Other: Click or tap here to enter text.		Choose an item.	

Competencies	
Personnel Management	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Sanitation, Safety, and Security	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Facility and Property Management	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Marketing, Communication, and Customer Service	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Procurement and Inventory management	Preferred/Required
Choose an item.	Choose an item.

Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Nutrition and Meal Management	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Financial Management and Accountability	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.
Meal Preparation and Service	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.

Approved by:
I certify that to the best of my knowledge this job description is accurate and complete.

Supervisor Signature **Date**

Department Head Signature **Date**

District Level Signature **Date**

How to Use the Sample Job Description Template

General Function and Scope

School nutrition (SN) manager supervise all aspects of site-wide SN programs. They perform a variety of job functions essential to the successful operation of school-based child nutrition programs. These job functions fall under eight functional areas: personnel management; sanitation, safety, and security; facility and property management; marketing, communication, and customer service; procurement and inventory management; nutrition and meal management; financial management and accountability; and meal preparation and service. The job responsibilities encompassed within these functional areas can be divided into one or more managerial positions, as considered appropriate for the SN program.

The information provided in the *Competency, Knowledge and Skills for School Nutrition Managers* resource is a framework for SN administrators to design SN manager positions and to create job descriptions. Below are step-by-step instructions on how to use the sample job description template to create SN manager job descriptions at the district level.

Step 1: In the boxes marked “click or tap here to enter text,” enter the information required for the job description.

In the boxes marked “choose an item,” select your choice from the drop-down menu. For example, in **Position Type**, the choices are “full-time” or “part-time.” In **Date Posted** and **Closing Date**, there is a calendar that opens for you to choose the date needed.

Position Information			
Position Title:	Click or tap here to enter text..	Position Type:	Choose an item.
Location:	Click or tap here to enter text..	Date Posted:	Click or tap to enter a date.
Level/Salary Range:	Click or tap here to enter text..	Closing Date	Click or tap to enter a date.

Qualifications		
Education	Emphasis/Major (If Applicable)	Preferred/Required
High School Degree or GED	N/A	Choose an item.
Associates Degree	Choose an item.	Choose an item.
Bachelor's Degree	Choose an item.	Choose an item.
Master's Degree	Choose an item.	Choose an item.
Other:		Choose an item.
Work Experience	Years of Experience	Preferred/Required
School Nutrition	Choose an item.	Choose an item.
School Nutrition Management District Level	Choose an item.	Choose an item.
School Nutrition Management School/Unit Level	Choose an item.	Choose an item.
Food Service	Choose an item.	Choose an item.
Food Service Management	Choose an item.	Choose an item.
Other:		Choose an item.
Credentials		Preferred/Required
Serve-Safe		Choose an item.
Registered Dietitian		Choose an item.
School Nutrition Specialist (SNS)		Choose an item.
SNA Level 1		Choose an item.
SNA Level 2		Choose an item.
SNA Level 3		Choose an item.
Other:		Choose an item.

Step 2: Choose the qualifications required or preferred for the position. Where it says “choose an item,” select your choice from the drop-down menu. If there is an item that says, “click or tap here to enter text,” enter the appropriate text for the job description. **Please note that you can delete rows as needed to complete the job description. To do this, you must select and highlight the row or rows you want to delete using your computer mouse. Under **Table Tools** (at the top of the page), click the **Layout** tab. In the **Rows & Columns** group, click **Delete**. Select **Delete Rows**.

Step 3: In the Competencies section, there are eight functional areas. Under each functional area, you may select the competency that is preferred or required for the job description. These competencies are listed in drop down boxes in the left column of the table. The last item under each functional area is titled **Other**

Knowledge and Skills.

This section allows you to add any additional knowledge and skills preferred or required to do the job. In the box marked "click here to enter text," enter the information. In the second column, choose whether this competency, knowledge, or skill is preferred or required using the drop-down menu. **Please note that you can delete rows as needed to complete the job description. To do this, you must select and highlight the row or rows you want to delete using your computer mouse. Under **Table Tools** (at the top of the page), click the **Layout** tab. In the **Rows & Columns** group, click **Delete**. Select **Delete Rows**.

Competencies	
Personnel Management	Preferred/Required
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Choose an item.	Choose an item.
Other Knowledge and Skills Click here to enter text.	Choose an item.

Form updated: 7/3/2018 10:05 AM (Initials Here)
1

Step 4: In the footer, the date and time on the form is updated automatically. The person editing the form may add their initials to identify who updated the form, if desired.

Step 5: Once the job description is complete, distribute for approvals. These titles are examples and may be changed to fit the institution's needs.

Approved by:
I certify that to the best of my knowledge this job description is accurate and complete.

Supervisor Signature	Date
Department Head Signature	Date
District Level Signature	Date

Additional Editing Notes: Any row in the document can be deleted to format the job description to meet the needs of your SN program. To do this, you must select and highlight the row or rows you want to delete using your computer mouse. Under **Table Tools** (at the top of the page), click the **Layout** tab. In the **Rows & Columns** group, click **Delete**. Select **Delete Rows**.

Individual Mentor Plan

Competencies, Knowledge, and Skills for School Nutrition Managers Individual Mentor Plan				
Part I – Employee/Mentor Information				
Name:	Mentoring Time Period:			
Position:	Mentor’s Name:			
Part II – Employee’s Career Goals				
Short-Term Goals (6 months – 1 year):				
Long-Term Goals (2 – 3 Years):				
Part III – Employee’s Developmental Needs				
Knowledge or Skill	Development Activity	Target Completion Date	Actual Completion Date	Outcome

How to Use the Competencies, Knowledge, and Skills for School Nutrition Managers Individual Mentor Plan

General Function and Scope

Mentoring is a special partnership between two people who share mutual responsibility and accountability to achieve clearly defined goals. It can be an important and effective way to grow and develop school nutrition (SN) staff.

The Individual Mentor Plan allows SN directors to work closely with SN staff to identify career-related goals to move individuals along their identified professional path, using the competencies, knowledge, and skills resource as a guide. The Individual Mentor Plan should be completed by both a mentor (SN manager’s supervisor, SN director, or another SN manager) and a mentee (SN manager or aspiring SN manager).

Competencies, Knowledge, and Skills for School Nutrition Managers Individual Mentor Plan	
Part I – Employee/Mentor Information	
Name:	Mentoring Time Period:
Position:	Mentor’s Name:

Part I: Enter employee’s name, employee’s position, the timeframe for the mentoring process, and the mentor’s name.

Part II: The mentor and mentee should work together to help the mentee identify short-term and long-term career goals. The mentor should help the mentee ensure that the goals are specific, measurable, achievable, relevant, and time-bound (**SMART**). Once those goals have been identified and developed, they should be documented in part II of this form.

Part II – Employee’s Career Goals
Short-Term Goals (6 months – 1 year):
Long-Term Goals (2 – 3 Years):

Part III – Employee’s Developmental Needs				
Knowledge or Skill	Development Activity	Target Completion Date	Actual Completion Date	Outcome

Part III: The mentor and mentee should utilize the goals established in Part II to complete Part III. Based on the short-term and/or long-term goals identified, the knowledge and skills needed to meet those goals must be identified. The mentor and mentee should work together to identify which knowledge and/or skill will be required to reach the goal, and to identify a path to successful achievement of the knowledge or skill. Building a developmental plan for the mentee requires the following actions:

- In column one, list the knowledge or skill that the employee needs to develop.
- In column two, describe the activity (i.e., training course, experience) needed to achieve the knowledge or skill. There may be more than one activity required to gain the knowledge or skill.
- In column three, enter a realistic target date for completing each activity listed.
- In column four, enter the actual date each activity was completed.
- In column five, describe the outcome of your participation in the identified activity. For example, did the mentee gain or improve proficiency in the knowledge or skill?

Note: All of the columns will not be filled out at the same time. Columns one (1) through three (3) should be completed during one session with the mentor. Column four (4) will be completed once each identified activity has been accomplished. To complete column five (5), the mentor and mentee should meet to discuss the outcomes of completing all of the activities listed for a specific knowledge or skill identified in column one. Once that has been discussed, it can be documented on the plan.

Competency-Based Performance Appraisal

Position Information				
Employee Name: Click here to enter text.				
Position Title: Click here to enter text.				
Department: Click here to enter text.			Supervisor: Click here to enter text.	
Appraisal Type: Probationary <input type="checkbox"/> Annual <input type="checkbox"/> Reappraisal <input type="checkbox"/>			Evaluation Period: From Click here to enter a date. To Click here to enter a date.	
<p>Section 1 - Essential Job Duties and Responsibilities</p> <ul style="list-style-type: none"> Beside each "Essential Duty," there is a drop-down box option with the competency statements linked to each of the highlighted functional areas from the <i>Competencies, Knowledge, and Skills for School Nutrition Managers</i> resource. Click on "choose an item" to select the appropriate competency statement based on the manager's job description and job duties. Check the rating that corresponds to your overall assessment of the employee's performance as described in the competency statement. *If performance in a competency requires improvement, comments are required. If performance in a competency area is exceptional, comments are highly recommended. 				
Needs Improvement	Does not meet standard; significant improvement is required.	Needs Improvement	Effective	Exceptional
Effective	Consistently meets requirements and may occasionally exceed standard.			
Exceptional	Far exceeds standard; delivers exemplary results in performance against goals and core competencies.			
Personnel Management				
Essential Duty #1: Choose an item.		□	□	□
Essential Duty #2: Choose an item.		□	□	□
Essential Duty #3: Choose an item.		□	□	□
Essential Duty #4: Choose an item.		□	□	□
Essential Duty #5: Choose an item.		□	□	□
Essential Duty #6: Choose an item.		□	□	□
Essential Duty #7: Choose an item.		□	□	□
Essential Duty #8: Choose an item.		□	□	□
Other Knowledge and Skills Click here to enter text.		□	□	□
Sanitation, Safety, and Security				
Essential Duty #1: Choose an item.		□	□	□
Essential Duty #2: Choose an item.		□	□	□
Essential Duty #3: Choose an item.		□	□	□
Other Knowledge and Skills Click here to enter text.		□	□	□
Facility and Property Management				
Essential Duty #1: Choose an item.		□	□	□
Essential Duty #2: Choose an item.		□	□	□

Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			
Marketing, Communication, and Customer Service			
Essential Duty #1: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			
Procurement and Inventory Management			
Essential Duty #1: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #5: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			
Nutrition and Meal Management			
Essential Duty #1: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			
Financial Management and Accountability			
Essential Duty #1: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #5: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #6: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			
Meal Preparation and Service			
Essential Duty #1: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #5: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #6: Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Click here to enter text.			

OVERALL RATING FOR COMPETENCY-BASED JOB DUTIES Choose an item.			
Section 2 – Performance Goals			
Instructions:			
<ul style="list-style-type: none"> • List previously identified goals (from the previous performance appraisal) in order of importance. • Review goals periodically and make changes to this section if goals or priorities change during the course of the performance period. • At the end of the appraisal period, rate each goal individually using the rating guidelines provided on this page. • Consider the individual rating for each goal based on its level of priority. Assign a numeric category score for overall goal achievement. 			
Ratings Guidelines:			
Exceptional The school nutrition manager has made significant contributions to meet and exceed goal expectations.			
Effective The school nutrition manager has performed in an exemplary manner and met the goal within the established timeframe.			
Needs Improvement The school nutrition manager has serious deficiencies in meeting the goal.			
PRIORITY RATING	GOAL DESCRIPTION	RESULTS AND COMMENTS	RATING
1	Click here to enter text.	Click here to enter text.	Choose an item.
2	Click here to enter text.	Click here to enter text.	Choose an item.
3	Click here to enter text.	Click here to enter text.	Choose an item.
4	Click here to enter text.	Click here to enter text.	Choose an item.
5	Click here to enter text.	Click here to enter text.	Choose an item.
OVERALL RATING FOR PERFORMANCE GOALS Choose an item.			
Section 3 – Goal Setting			
Instructions:			
Identify any performance goals that you and the school nutrition manager have set for the coming year. Goals should be specific, measurable, achievable, relevant, and time-bound (SMART).			
Goal(s)	Date		
Click here to enter text.	Click or tap to enter a date.		
Click here to enter text.	Click or tap to enter a date.		
Click here to enter text.	Click or tap to enter a date.		

Section 4 – Overall Rating and Comments

Overall Rating Guidelines:
Review all of your ratings. Enter the overall rating that best represents your overall rating of this employee’s performance during the evaluation period.

RATING	RATING DESCRIPTION	OVERALL RATING SELECTION
Needs Improvement	Does not meet standard; significant improvement is required.	<input type="checkbox"/>
Effective	Consistently meets requirements and may occasionally exceed standard.	<input type="checkbox"/>
Exceptional	Far exceeds standard; delivers exemplary results in performance against goals and core competencies.	<input type="checkbox"/>

Evaluator Comments: Discuss your assessment of the manager’s developmental needs, suggest ways the manager can meet those needs, and include how you plan to help the manager meet the needs.

Click here to enter text.

Manager Response: Discuss your thoughts about the evaluation and identify ways the school nutrition administrator can help you optimize your performance.

Click here to enter text.

Manager’s Signature: _____ Date: _____

Evaluator’s Name: _____ Signature: _____ Date: _____

How to Use the Sample Performance Appraisal Template

General Function and Scope

Competencies are the underlying characteristics within each functional area that lead to successful performance. Competencies are measurable patterns of knowledge and skills needed to perform and fulfill job responsibilities. With competency-based performance appraisals, school nutrition (SN) administrators can assess what an employee accomplishes, and how they do it.

The School Nutrition Manager Competency-Based Performance Appraisal provides SN administrators with a tool to evaluate employee performance, guided by the competencies identified in the *Competencies, Knowledge, and Skills for School Nutrition Managers* resource. This tool will help SN administrators clearly communicate to SN managers the expectations for the position, providing a foundation for dialogue between SN administrators and SN managers about performance, growth, and career-related milestones. School nutrition administrations will also be able to establish performance benchmarks to improve the accuracy of observing, discussing, and evaluating SN managers.

Step-by-step instructions are provided within the performance appraisal to guide the review process. Each section of the appraisal addresses different elements of the review.

Step 1 Position Information: In the boxes next to **Employee Name**, **Position Title**, **Department**, and **Supervisor** marked "Click here to enter text," enter the information required for the performance appraisal.

In the box **Appraisal Type**, check whether the performance appraisal is a "Probationary," "Annual," or "Reappraisal" performance appraisal. In the box **Evaluation Period**, calendars open for you to choose the start and completion date of the performance appraisal.

Position Information	
Employee Name: Click here to enter text.	
Position Title: Click here to enter text.	
Department: Click here to enter text.	Supervisor: Click here to enter text.
Appraisal Type:	
Probationary <input type="checkbox"/> Annual <input type="checkbox"/> Reappraisal <input type="checkbox"/>	
Evaluation Period:	
From <input type="text"/> Click here to enter a date. To <input type="text"/> Click here to enter a date.	

Needs Improvement	Does not meet standard; significant improvement is required.	Needs Improvement	Effective	Exceptional
Effective	Consistently meets requirements and may occasionally exceed standard.			
Exceptional	Far exceeds standard; delivers exemplary results in performance against goals and core competencies.			
Personnel Management				
Essential Duty #1: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #2: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #3: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #4: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #5: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #6: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #7: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential Duty #8: Choose an item.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Knowledge and Skills		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<small>Click here to enter text.</small>				

Step 2 Essential Job Duties and Responsibilities:
 In this section, utilize the drop-down boxes marked "choose an item" in the left column to select the desired competency-based essential duty. The last item under this section is titled **Other Knowledge and Skills**. Use this to add any additional knowledge and skills required for the SN staff

but are not listed in the drop-down boxes. In the box marked "click here to enter text," enter the information. To the right of each essential duty, check whether the performance of the essential duty rates as "Exceptional," "Effective," or "Needs Improvement." **Please note that you can delete rows as needed to complete the job description. To do this, you must select and highlight the row or rows you want to delete using your computer mouse. Under **Table Tools** (at the top of the page), click the **Layout** tab. In the **Rows & Columns** group, click **Delete**. Select **Delete Rows**.

Step 3 Performance Goals: In the **Goal Description** and **Results and Comments** columns, each row is marked "click here to enter text." Enter the information required for each row. In the column marked **Rating**, each row is marked "choose an item." Click on the drop-down menu and select either "Exceptional," "Effective," or "Needs Improvement."

Ratings Guidelines:

Exceptional The school nutrition manager has made significant contributions to meet and exceed goal expectations.

Effective The school nutrition manager has performed in an exemplary manner and met the goal within the established timeframe.

Needs Improvement The school nutrition manager has serious deficiencies in meeting the goal.

PRIORITY RATING	GOAL DESCRIPTION	RESULTS AND COMMENTS	RATING
1	Click here to enter text.	Click here to enter text.	Choose an item.
2	Click here to enter text.	Click here to enter text.	Choose an item.
3	Click here to enter text.	Click here to enter text.	Choose an item.
4	Click here to enter text.	Click here to enter text.	Choose an item.
5	Click here to enter text.	Click here to enter text.	Choose an item.
OVERALL RATING FOR PERFORMANCE GOALS			Choose an item.

Instructions:
 Identify any performance goals that you and the school nutrition manager have set for the coming year. Goals should be specific, measurable, achievable, relevant, and time-bound (SMART).

Goal(s)	Date
Click here to enter text.	Click or tap to enter a date.
Click here to enter text.	Click or tap to enter a date.
Click here to enter text.	Click or tap to enter a date.

Step 4 Goal Setting: In the column titled **Goal(s)**, enter text in each row marked "click here to enter text." In the column titled **Date** (which is found on each row), a calendar opens for you to choose the date needed.

Step 5 Overall Rating and Comments: In this section, check the box under the column **Overall Rating Selection** that corresponds with the overall rating that best represents the employee’s performance.

Overall Rating Guidelines: Review all of your ratings. Enter the overall rating that best represents your overall rating of this employee’s performance during the evaluation period.		
RATING	RATING DESCRIPTION	OVERALL RATING SELECTION
Needs Improvement	Does not meet standard; significant improvement is required.	<input type="checkbox"/>
Effective	Consistently meets requirements and may occasionally exceed standard.	<input type="checkbox"/>
Exceptional	Far exceeds standard; delivers exemplary results in performance against goals and core competencies.	<input type="checkbox"/>

Evaluator Comments: Discuss your assessment of the manager’s developmental needs, suggest ways the manager can meet those needs, and include how you plan to help the manager meet the needs.

Click here to enter text.

Manager Response: Discuss your thoughts about the evaluation and identify ways the school nutrition administrator can help you optimize your performance.

Click here to enter text.

Step 6 Evaluator Comments and Manager Response: In this section, there are two areas that need to be complete. In each textbox marked “click here to enter text,” enter the information required for each area.

Step 7: Once the performance appraisal is complete, distribute for review and approval as needed. These titles are examples and may be changed to fit the institution's needs.

Manager's Signature: _____	Date: _____
Evaluator's Name: _____	Signature: _____ Date: _____

Additional Editing Notes: Any row in the document can be deleted to format the job description to meet the needs of your SN program. To do this, you must select and highlight the row or rows you want to delete using your computer mouse. Under **Table Tools** (at the top of the page), click the **Layout** tab. In the **Rows & Columns** group, click **Delete**. Select **Delete Rows**.



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