

# Competencies, Knowledge, and Skills for School Nutrition Managers

---



Applied Research Division • The University of Southern Mississippi



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

## **Primary Investigator**

Kristi L. Lewis, PhD, RDN

## **Co-Investigator**

Marjuyua Lartey, PhD, RDN

## **Graphic Design**

Travis Brewington

Shellie Hubbard

## **Executive Director**

Aleshia Hall-Campbell, PhD, MPH



**2018**



# **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.

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

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

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability.

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights; Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

© 2018, Institute of Child Nutrition, The University of Mississippi, School of Applied Sciences

Except as provided below, you may freely use the text and information contained in this document for non-profit or educational use with no cost to the participant for the training providing the following credit is included. These materials may not be incorporated into other websites or textbooks and may not be sold.

Suggested Reference Citation:

Institute of Child Nutrition. (2018). *Competencies, knowledge, and skills for school nutrition managers*. University, MS: Lewis, K. & Lartey, M.

The photographs and images in this document may be owned by third parties and used by The University of Mississippi and the University of Southern Mississippi under a licensing agreement. The University cannot, therefore, grant permission to use these images.

**For more information, please contact [helpdesk@theicn.org](mailto:helpdesk@theicn.org)**

08/14/2018





# Table of Contents

|  |             |
|--|-------------|
| <b>I. Introduction .....</b>   | <b>7</b>    |
| <b>II. How to use this Resource .....</b>  | <b>9</b>    |
| <b>III. Competencies, Knowledge, and Skills</b>                                  |             |
| <b>A. Functional Area 1: Personnel Management .....</b>                          | <b>11</b>   |
| <b>B. Functional Area 2: Sanitation, Safety, and Security.....</b>               | <b>29</b>   |
| <b>C. Functional Area 3: Facility and Property Management .....</b>              | <b>39</b>   |
| <b>D. Functional Area 4: Marketing, Communication, and Customer Service.....</b> | <b>49</b>   |
| <b>E. Functional Area 5: Procurement and Inventory Management .....</b>          | <b>59</b>   |
| <b>F. Functional Area 6: Nutrition and Meal Management.....</b>                  | <b>71</b>   |
| <b>G. Functional Area 7: Financial Management and Accountability.....</b>        | <b>79</b>   |
| <b>H. Functional Area 8: Meal Preparation and Service.....</b>                   | <b>93</b>   |
| <b>IV. Application Tool.....</b>   | <b>107</b>  |
| <b>A. Competency-Based Job Description.....</b>                                  | <b>109</b>  |
| <b>B. Individual Mentor Plan .....</b>   | <b>117</b>  |
| <b>C. Competency-Based Performance Appraisal .....</b>                           | <b>121i</b> |





# 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.





## 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.







## 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.





## 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.)*



### 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





## 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.



### 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.





## 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.





## 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.)*



### 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.





## 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.)*



## 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.)*

**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





## 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.



**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 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.





## 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.





## 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





## 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.)*



### 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 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.





## 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.)*



### 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.







## 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.



### 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.)*



### 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.





## 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







## 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.





## 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.





## 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





## 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 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.





## 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.)*



### 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





## 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 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.





## 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.)*



### 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.





## 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 cashing 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







## 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.





## 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.



**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.)*



### 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.







## 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.





## 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.





## 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





## 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







## 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.





## 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                          |                                  |                                |                               |
|---|----------------------------------|--------------------------------|-------------------------------|
| <b>Position Title:</b>                        | Click or tap here to enter text. | <b>Position Type:</b>          | Choose an item.               |
| <b>Location:</b>                              | Click or tap here to enter text. | <b>Date Posted:</b>            | Click or tap to enter a date. |
| <b>Level/Salary Range:</b>                    | Click or tap here to enter text. | <b>Closing Date</b>            | 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   |                           |
|--|---------------------------|
| <b>Personnel Management</b>                                    | <b>Preferred/Required</b> |
| 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.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Sanitation, Safety, and Security</b>                        | <b>Preferred/Required</b> |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Facility and Property Management</b>                        | <b>Preferred/Required</b> |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Marketing, Communication, and Customer Service</b>          | <b>Preferred/Required</b> |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Procurement and Inventory management</b>                    | <b>Preferred/Required</b> |
| 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.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Nutrition and Meal Management</b>                           | <b>Preferred/Required</b> |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| Choose an item.  | Choose an item.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Financial Management and Accountability</b>                 | <b>Preferred/Required</b> |
| 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.           |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | Choose an item.           |
| <b>Meal Preparation and Service</b>                            | <b>Preferred/Required</b> |
| 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.           |
| <b>Other Knowledge and Skills</b><br>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       |                                  |                       |                               |
|----------------------------|----------------------------------|-----------------------|-------------------------------|
| <b>Position Title:</b>     | Click or tap here to enter text. | <b>Position Type:</b> | Choose an item.               |
| <b>Location:</b>           | Click or tap here to enter text. | <b>Date Posted:</b>   | Click or tap to enter a date. |
| <b>Level/Salary Range:</b> | Click or tap here to enter text. | <b>Closing Date</b>   | 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.    |

**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.    |
| <b>Other Knowledge and Skills</b><br>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<br>for School Nutrition Managers<br>Individual Mentor Plan |                      |                        |                        |         |
|--|----------------------|------------------------|------------------------|---------|
| <b>Part I – Employee/Mentor Information</b>  |                      |                        |                        |         |
| Name:  |                      |                        | Mentoring Time Period: |         |
| Position:  |                      |                        | Mentor's Name:         |         |
| <b>Part II – Employee's Career Goals</b>   |                      |                        |                        |         |
| Short-Term Goals (6 months – 1 year):  |                      |                        |                        |         |
| Long-Term Goals (2 – 3 Years):   |                      |                        |                        |         |
| <b>Part III – Employee's Developmental Needs</b>   |                      |                        |                        |         |
| 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<br>for School Nutrition Managers<br>Individual Mentor Plan |                        |
|--|------------------------|
| <b>Part I – Employee/Mentor Information</b>  |                        |
| 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.

| <b>Part II – Employee's Career Goals</b> |
|--|
| 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   |  |                          |  |                          |
|--|--|--------------------------|--|--------------------------|
| <b>Employee Name:</b> Click here to enter text.  |  |                          |  |                          |
| <b>Position Title:</b> Click here to enter text.   |  |                          |  |                          |
| <b>Department:</b> Click here to enter text.   |  |                          | <b>Supervisor:</b> Click here to enter text.                       |                          |
| <b>Appraisal Type:</b>   |  |                          | <b>Evaluation Period:</b>  |                          |
| Probationary <input type="checkbox"/> Annual <input type="checkbox"/> Reappraisal <input type="checkbox"/>   |  |                          | From Click here to enter a date.<br>To Click here to enter a date. |                          |
| <b>Section 1 - Essential Job Duties and Responsibilities</b> <ul style="list-style-type: none"> <li>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.</li> <li>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, <b>comments are required</b>. If performance in a competency area is exceptional, <b>comments are highly recommended</b>.</li> </ul> |  |                          |  |                          |
| <b>Needs Improvement</b>   | Does not meet standard; significant improvement is required.   | <b>Needs Improvement</b> | <b>Effective</b>   | <b>Exceptional</b>       |
| <b>Effective</b>   | Consistently meets requirements and may occasionally exceed standard.                                |                          |  |                          |
| <b>Exceptional</b>   | Far exceeds standard; delivers exemplary results in performance against goals and core competencies. |                          |  |                          |
| <b>Personnel Management</b>  |  |                          |  |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b>  |  | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> |
| Click here to enter text.  |  |                          |  |                          |
| <b>Sanitation, Safety, and Security</b>  |  |                          |  |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b>  |  | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> |
| Click here to enter text.  |  |                          |  |                          |
| <b>Facility and Property Management</b>  |  |                          |  |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Marketing, Communication, and Customer Service</b>          |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Procurement and Inventory Management</b>                    |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Nutrition and Meal Management</b>                           |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Financial Management and Accountability</b>                 |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Meal Preparation and Service</b>                            |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b><br>Click here to enter text. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**OVERALL RATING FOR COMPETENCY-BASED JOB DUTIES** Choose an item.

**Section 2 – Performance Goals**

**Instructions:**

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





|                                    |  |                          |                          |                          |
|------------------------------------|--|--------------------------|--------------------------|--------------------------|
| <b>Needs Improvement</b>           | Does not meet standard; significant improvement is required.   | <b>Needs Improvement</b> | <b>Effective</b>         | <b>Exceptional</b>       |
| <b>Effective</b>                   | Consistently meets requirements and may occasionally exceed standard.                                |                          |                          |                          |
| <b>Exceptional</b>                 | Far exceeds standard; delivers exemplary results in performance against goals and core competencies. |                          |                          |                          |
| <b>Personnel Management</b>        |  |                          |                          |                          |
| 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"/> |
| <b>Other Knowledge and Skills</b>  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Click here to enter text.          |  |                          |                          |                          |

## 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."

| <b>Ratings Guidelines:</b>                  |  |                           |                 |
|---|--|---------------------------|-----------------|
| <b>Exceptional</b>                          | The school nutrition manager has made significant contributions to meet and exceed goal expectations.                |                           |                 |
| <b>Effective</b>                            | The school nutrition manager has performed in an exemplary manner and met the goal within the established timeframe. |                           |                 |
| <b>Needs Improvement</b>                    | 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. |
| <b>OVERALL RATING FOR PERFORMANCE GOALS</b> |  |                           | 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.

| <b>Overall Rating Guidelines:</b><br>Review all of your ratings. Enter the overall rating that best represents your overall rating of this employee's performance during the evaluation period. |  |                                 |
|---|--|---------------------------------|
| <b>RATING</b>   | <b>RATING DESCRIPTION</b>  | <b>OVERALL RATING SELECTION</b> |
| <b>Needs Improvement</b>  | Does not meet standard; significant improvement is required.   | <input type="checkbox"/>        |
| <b>Effective</b>  | Consistently meets requirements and may occasionally exceed standard.                                | <input type="checkbox"/>        |
| <b>Exceptional</b>  | 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**.





I N S T I T U T E O F  
*child nutrition*  
R E S O U R C E S • T R A I N I N G • R E S E A R C H

**Applied Research Division  
The University Of Southern Mississippi  
Grant Year 2016 #2**

**800-321-3054  
[www.theicn.org](http://www.theicn.org)**