

# Manager's Corner

## Production Records

**PROJECT COORDINATOR**  
Theresa Stretch, MS, RDN, CP-FS

**EXECUTIVE DIRECTOR**  
Aleshia Hall-Campbell, PhD, MPH



NUTRITION



OPERATIONS



ADMINISTRATION



COMMUNICATIONS/  
MARKETING

# 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/TitleVI/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.

© 2019, 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. (2019). *Manager's corner: Production records*. University, MS: Author.

The photographs and images in this document may be owned by third parties and used by the University of 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).

February 27, 2019

## Table of Contents

Professional Standards .....	1
Introduction .....	1
Lesson Overview—Questions .....	3
Required Information for School Meals Production Record Handout.....	5
Sample Daily Menu Production Record Handout .....	7
References .....	10



## Professional Standards

### FOOD PRODUCTION – 2100

**Employee will be able to effectively utilize food preparation principles, production records, kitchen equipment, and food crediting to prepare foods from standardized recipes, including those for special diets.**

2120 – Complete a food production record and other required paperwork.

## Introduction

*Manager's Corner: Production Records* is designed for managers to use in training their staff. Each lesson is roughly 15 minutes. *Manager's Corner: Production Records* provides a method for empowering managers to train their staff. This lesson plan contains the following:

- learning objective,
- statement explaining the importance of the topic,
- list of materials,
- instructions on how to present the information,
- questions to ask staff, and
- an activity to strengthen or refresh the knowledge of the staff.



## Lesson Overview—Questions

**Objective:** Identify the required information and the benefits of production records.

**Why it is important:** The production record is used to document that reimbursable meals were served. Additionally, production records supply a wealth of information for forecasting products, purchasing foods, controlling waste, and identifying popular and not so popular menu items. Production records are part of the Administrative Review process.

**Materials included in this document:**

- **District's Production Record**
- **Required Information for School Meals Production Record Handout**
- **Sample Daily Menu Production Record Handout**

**Instruction:**

Ask the staff to answer the questions included in this training. Facilitate the activity.

**Questions for the staff:**

- **What are some benefits of production records?**

**Answer:** The production record provides documentation that support meeting federal regulations. Production records also help staff identify the quantity to prepare and can help to reduce waste

- **What are the required elements of a production record used in school nutrition operations?**

**Answer:** The following elements of a production record are a USDA requirement:

- Name of school/site
- Grade group
- Date
- Menu
- Menu type (lunch or breakfast)
- OVS or Pre-plated (served) Additional information may be included on production records.
- Planned (projected) number of student meals – provides an estimate of planned (projected) student meals for the specified grade group
- Actual number of student meals offered (prepared) – provides the total number of student meals offered (prepared) for the specified grade group

- Actual number of student meals selected (served) – provides the total number of student meals selected (served) for the specified grade group
- Planned (projected) number of nonreimbursable meals – the number of staff and guests
- Offered (prepared) number of nonreimbursable meals – the number of staff and guests
- Actual number of nonreimbursable meals selected (served) – provides the total number of nonreimbursable meals selected (served) for the specified school/site
- Menu/food Items – all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation
- Planned (projected), offered (prepared), and selected (served) number of milk by type

**Activity Instructions:**

- Bring enough copies of your district's production record for all staff attending the training. Ask staff to identify the required elements of a production record. At the end of the activity, refer staff to the **Required Information for School Meals Production Record Handout** and the **Sample Daily Menu Production Record Handout**

## Required Information for School Meals Production Record Handout

Production Record	Information
<b>Basic Information</b>	<ul style="list-style-type: none"> <li>■ Name of school/site</li> <li>■ Grade group</li> <li>■ Date</li> <li>■ Menu</li> <li>■ Menu type (lunch or breakfast)</li> <li>■ OVS or Pre-plated (served)</li> </ul>
<b>Reimbursable meals</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of student meals</i> – provides an estimate of planned (projected) student meals for the specified grade group</li> <li>■ <i>Actual number of student meals offered (prepared)</i> – provides the total number of student meals offered (prepared) for the specified grade group</li> <li>■ <i>Actual number of student meals selected (served)</i> – provides the total number of student meals selected (served) for the specified grade group</li> </ul>
<b>Nonreimbursable meals</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of nonreimbursable meals</i> – the number of staff and guests</li> <li>■ <i>Offered (prepared) number of nonreimbursable meals</i> – the number of staff and guests</li> <li>■ <i>Actual number of nonreimbursable meals selected (served)</i> – provides the total number of nonreimbursable meals selected (served) for the specified school/site</li> </ul>
<b>All Menu Items Listed</b>	<ul style="list-style-type: none"> <li>■ <i>Menu/food Items</i> – all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation</li> <li>■ <i>Planned (projected), offered (prepared), and selected (served) number of milk by type</i> – fat-free unflavored, fat-free chocolate or other flavors, 1% low-fat unflavored, 1% low-fat chocolate or other flavors</li> </ul>
<b>Recipe/Product Number</b>	<ul style="list-style-type: none"> <li>■ <i>Recipe ID/product ID number</i> – standardized recipe number (USDA or your local recipe number) or product</li> <li>■ <i>ID number</i></li> </ul>

## Required Information for School Meals Production Record Handout, continued

Production Record	Information
<b>Portion Size</b>	<ul style="list-style-type: none"> <li>■ <i>Portion size for the specified grade group</i> – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.</li> </ul>
<b>Reimbursable Meal Components Provided by Portion Size</b>	<ul style="list-style-type: none"> <li>■ <i>Meats/meat alternates</i> in ounce equivalent (oz eq)</li> <li>■ <i>Grains</i> in oz eq (WGR indicates whole grain-rich)</li> <li>■ <i>Fruits</i> – portion offered in volume (½ cup in sample)</li> <li>■ <i>Vegetables</i> – portion offered in volume (¼ cup in sample)</li> <li>■ <i>Milk</i> – portion offered in volume (1 cup in sample)</li> </ul>
<b>Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of servings to prepare</i> – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined)</li> <li>■ <i>Planned (projected) quantity of food to use in purchase units</i> – forecasted from past production, standardized recipes and Food Buying Guide. Adjust on day-of-service, if needed</li> <li>■ <i>Actual number of servings offered (prepared)</i> – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed</li> <li>■ <i>Actual number of servings selected (served)</i> – provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation</li> <li>■ <i>Substitutions and leftovers</i> – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)</li> </ul>
<b>Verification Signature and Date</b>	<ul style="list-style-type: none"> <li>■ Person in charge of site reviews, verifies, signs and dates the production record, and files for future reference. Your State agency may require signed production records.</li> </ul>

Adapted from USDA's *Anatomy of a Production Record* Appendix 4.A (2018, September)



# Sample Daily Menu Production Record Handout, continued

**SAMPLE**

## Daily Menu Production Record — Food-Based Menu Planning

- Name of school/site: Eagle's Nest Elementary
  - Grade Group: K-5
  - Date: September 20, 2018
  - Menu: Grilled cheese sandwich or Chicken nuggets & Rice pilaf, Broccoli, Cherry tomatoes, Celery sticks, Fruit cocktail, Orange wedges, Milk: assorted fat-free & 1%
- Breakfast  
 Lunch  
 OVS  
 Pre-plated (served)
- Reimbursable Meals**  
 6 Number of student meals planned (projected): 50  
 7 Number of student meals offered (prepared): 45  
 8 Number of student meals selected (served): 45
- Nonreimbursable Meals**  
 9 Number of meals planned (projected): 5  
 10 Number of meals offered (prepared): 5  
 11 Number of meals selected (served): 4

12 Menu/Food Items	14 Recipe ID/ Product ID	15 Portion Size	16 Component Contributions Per Portion Size				21 Planned (Projected) Servings				22 Planned (Projected) Quantity of Food (in purchase units)				23 Actual Number Serving Offered (Prepared)				24 Actual Number Serving Selected (Served)				25 Substitutions, Leftovers, and Notes		
			Meats/Meat Alternates	Grains	Fruits	Vegetables	Milk	R	NR	T	R	NR	T	R	NR	T	R	NR	T						
																				R	NR	T		R	NR
Grilled Cheese Sandwich	R# 32	1 ea	2 oz eq WGR	2 oz eq WGR				24			24			20			20			20			No leftovers, all children were offered both choices		
XYZ Chicken Nuggets w/ WG, 3.97 oz = 2 oz/M/J/A, 1 oz WG CN#123456	P# 4203	#6 scoop (6 ea)	2 oz eq WGR	1 oz eq WGR				30	5	35	30	5	35	30	5	35	30	5	35	30	5	35	3 servings leftover, discarded		
Brown Rice Pilaf, USDA recipe	R# B22	#8 scoop	1 oz eq WGR	1 oz eq WGR				32	5	37	32	5	37	32	5	37	32	5	37	32	5	37	1 1/4 cups leftover, discarded		
Shredded Broccoli Florets (RTU), dark green vegetable	R# 15	2 fl oz spoodle			1/4 C			50	5	55	50	5	55	50	5	55	50	5	55	50	5	55	0.5 cup leftover, chilled and refrigerated for use in soup tomorrow		
Cherry Tomato (3 ea) RTU: ready-to-use, cleaned, trimmed florets	R# 18	1/4 C			1/4 C			30		30	30		30	2.5 lb		30	2.5 lb		30	2.5 lb		30	1 1/4 cups cherry tomatoes & 1 cup celery leftover, bagged & refrigerated for use in soup tomorrow		
Celery Sticks (3 ea, RTU) dark vegetable		1/4 C			1/4 C			30		30	30		30	2.25 lb		30	2.25 lb		30	2.25 lb		30	Substituted bananas, 5 cups leftover, refrigerated for use in breakfast tomorrow		
Fruit cocktail in high-syrup, drained, USDA Foods	R# 3	4 fl oz spoodle			1/2 C			35	3	38	35	3	38	2 #10 cans		35	3	38	35	3	38	25	3	28	
Orange Wedges (138 count)	R# 5	4 fl oz spoodle			1/2 C			15	3	18	15	3	18	4.5 lb		25	2	27	25	2	27	35	2	37	No leftovers, made 10 more servings, 3 more to need
Extra: Ranch dressing, 1/2 oz packets	P# 1514	1 ea						54		54	54		54	54 ea		50		50	50		50	45		45	5 leftover, returned to inventory
Milk by type & flavor	Item #							5		5	5		5	1 cup		5		5	5		5		5	No leftovers	
Fat-free (unflavored)	501	1 cup						30		30	30		30	1 cup		28		28	28		28		28		
Fat-Free (chocolate) 1% (unflavored)	502 503	1 cup 1 cup						10		10	10		10	1 cup		10		10	10		10		10		

26 Manager Signature *09/20/2018*

Verifier Signature \_\_\_\_\_ Date \_\_\_\_\_

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

# Sample Daily Menu Production Record Handout, continued

## Anatomy of a Production Record

If you're not clear about how to complete a production record, start by reviewing these details for each numbered item on the sample record:

### BASIC INFORMATION

- 1 Name of school/site
- 2 Grade group
- 3 Date
- 4 Menu
- 5 Menu type (lunch or breakfast) and OVS or Pre-plated (served)

### REIMBURSABLE MEALS

- 6 Planned (projected) number of student meals; provides an estimate of planned (projected) student meals for the specified grade group
- 7 Actual number of student meals offered (prepared); provided the total number of student meals offer (prepared) for the specified grade group
- 8 Actual number of student meals selected (served); provides the total number of student meals selected (served) for the specified grade

### NONREIMBURSABLE MEALS

- 9 Planned (projected) number of nonreimbursable meals – the number of staff and guests
- 10 Offered (prepared) number of nonreimbursable meals the number of staff and guests
- 11 Actual number of nonreimbursable meals selected (served); provides the total number of nonreimbursable meals selected (served) for the specified school/site

### ALL MENU ITEMS LISTED

- 12 Menu/food items – all food item choices offered on the specified grade group's menus, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparations
- 13 Planned (projected), offered (prepared), and selected (served) number of milk by type—fat-free, 1% low-fat unflavored, 1% low-fat chocolate or other flavors

### RECIPE/PRODUCT NUMBER

- 14 Recipe ID/product ID number – standardized recipe number (USDA or your local recipe number) or product ID

### PORTION SIZE

- 15 Portion size for the specified grade group – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.

### REIMBURSABLE MEAL COMPONENTS PROVIDED BY PORTION SIZE

- 16 Meats/meat alternates in ounce equivalent (oz eq)
- 17 Grains in oz eq (WG indicates whole grain-rich)
- 18 Fruits – portion offer in volume, (½ cup in sample)
- 19 Vegetables – portion offer in volume (¼ cup in sample), note that subgroup is identified in column #14
- 20 Milk – portion offered in volume (1 cup in sample)

### MEALS PLANNED (PROJECTED), OFFERED (PREPARED), SELECTED (SERVED), AND LEFTOVER

- 21 Planned (projected) number of servings to prepare – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined)
- 22 Planned (projected) quantity of food to use in purchased units – forecasted from past production, standardized recipes, and Food Buying Guide. Adjust on day-of-service, if needed
- 23 Actual number of servings offered (prepared) – provided total number of servings prepared with any changes from planned (projected) amounts noted, as needed
- 24 Actual number of servings selected (served) – provides total number of serving selected (served) for each food item on the menu; provides information for forecasting future meal preparation
- 25 Substitutions and leftovers – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)

### VERIFIER SIGNATURE & DATE

- 26 Person in charge of site review, verifies, signs, and dates the production record, and files for future reference. Your State agency may require signed production records

### OTHER DETAILS YOU MAY NEED OR WANT TO RECORD ARE:

- Food preparation and holding temperatures
- Specific information of value for preparation, service, and future forecasting, such as weather-related school closures, field trips, etc.
- Food Buying Guide details – source of calculations for purchase units required for total servings planned
- Additional required information by your State agency or school program

The sample is one example of a production record. Use the format that best fits your programs.

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



## References

Institute of Child Nutrition. (2019). *School nutrition S.T.A.R. meal preparation and service instructor's manual*. University, MS: Author.

United States Department of Agriculture. (2018, November 8). *Menu planner for school meals: School year 2018-2019*. Retrieved from: <https://www.fns.usda.gov/tn/menu-planner>

United States Department of Agriculture. (2015). *Professional standards for school nutrition professionals*. Retrieved from <https://www.fns.usda.gov/school-meals/professional-standards>





The University of Mississippi  
School of Applied Sciences

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