Section 27

Professional Standards

Section 27, Professional Standards

Update Guide	
May 19, 2023	Created new *Definitions* and *Contact Information* sections, located at the beginning of the *Administrator's Reference Manual (ARM)*. Removed definitions and contact information from this section.
July 28, 2022	Updated *Section 27, Professional Standards* to fix minor typos. Clarified information on the following topics: - Education and experience for Program Directors
January 4, 2022	Updated *Section 27, Professional Standards* to fix minor typos. Clarified information on the following topics: - Education and experience for Program Directors
August 12, 2020	Updated *Section 27, Professional Standards* to update *Administrator's Reference Manual (ARM)* section references.

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Professional Standards

The continuing education/training and hiring professional standards for the National School Lunch Program (NSLP) and School Breakfast Program (SBP) are intended to provide a framework to

- ensure that the personnel who manage and/or operate these programs have adequate knowledge and training to perform their duties,

- strengthen the ability of personnel to manage and/or operate the programs effectively and efficiently, and

- improve the quality of school meals, reduce errors, and enhance program integrity.

Who Does This Affect?
The guidance in this section applies to all personnel who manage and/or operate school nutrition programs (SNPs) as well as employees who are contracted to manage or operate an SNP on behalf of a contacting entity (CE). These requirements do not apply to the Special Milk Program.

What School Nutrition Programs (SNPs) Are Affected?
The requirements described in this section apply to CEs operating the following SNPs:

- National School Lunch Program (NSLP)

  – Afterschool Care Program (ASCP)

  – Fresh Fruit and Vegetable Program (FFVP)

  – Seamless Summer Option (SSO)

- School Breakfast Program (SBP)

If a CE operates a site under the Child and Adult Care Food Program (CACFP) or Summer Food Service Program (SFSP) in addition to its NSLP or SBP sites, the professional standards for continuing education/training and hiring apply to these sites.

Summary of Professional Standards for School Nutrition Programs

The *Summary of Professional Standards Chart* in this section provides an overview of the key elements of the professional standards requirements.

Summary of Professional Standards Chart

Types of Professional Standards

Continuing Education/Training Professional Standards (Training Standards) specify training hours and topics that are required based on employee responsibilities.

Hiring Professional Standards for Program Directors (Hiring Standards) specify the required educational background and professional experience for the program director.

Date of Hire/Employment

All Employees Hired and Employed Before or After July 1, 2015 must meet the training standards requirements each school year based on their job functions.

Program Directors Hired and Employed Before or After July 1, 2015 must meet the food safety training requirements every five years.

Program Directors Whose Positions Were Not Advertised Prior to July 1, 2015 and Who Are Hired and Employed on or after July 1, 2015 must meet the hiring standards requirements based on the total number of students enrolled in the CE's school(s).

> If the program director responsibilities are distributed across several positions, only the person hired to perform the majority of the program director duties must meet the program director hiring and training standards. If the program director and program manager positions are merged, the person performing the combined positions must fulfill the program director requirements.

Job Position Roles and Functions

School Nutrition Program Directors are those individuals directly responsible for management of the day-to-day operations of school food service for all participating schools under the jurisdiction of the contracting entity (CE).

> Program director responsibilities typically include, but are not limited to, administration, program implementation, monitoring, and evaluation of the following: sanitation, food safety, employee safety, nutrition and menu planning, food production, facility layout and design, equipment selection, procurement, financial management, recordkeeping, program accountability, marketing; customer service, nutrition education, general management, personnel management, and computer technology.

School Nutrition Program Managers are employees directly responsible for the management of the day-to-day operations of school food service for a participating school.[1]

Other School Nutrition Program Employees are employees, without managerial responsibilities, involved in the day-to-day operations for the SNP whether they are or not funded with school nutrition program funds.[2]

Food Service Management Company (FSMC) Staff must meet the hiring and training standards for the position they are hired to perform. If an FSMC staff member performs the responsibilities of the program director, the person employed by the CE who is assigned to manage the FSMC contract and ensure that all regulations are met must also meet the hiring and training standards. This oversight includes

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[1] A school nutrition program manager, as defined in this section, may be the manager for more than one participating school, but not all of the participating schools.
[2] Staff classified as other school nutrition program employees as defined in this section may work in more than one participating school.

requiring the FSMC to provide documentation that the FSMC has fully implemented the professional standards for continuing education/training and hiring.

Total Student Enrollment Level[3] (Based on the most current October 1 Data)

Smaller Sized Schools—2,499 students or less

Medium Sized Schools—2,500 to 9,999 students

Larger Sized Schools—10,000 students or more

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[3]   CEs must retain documentation demonstrating total student enrollment for the CE. See the *Records Retention* subsection in this section for additional information.

Continuing Education/Training Professional Standards (Training Standards)

Each employee must obtain the appropriate number of training hours based on job function(s) for each school year—July 1 to June 30. Program staff include, but are not limited to, cooks, cashiers, and others who are involved in the preparation and service of school meals; staff involved in other program operations such as eligibility determinations and meal counting and claiming; and support staff that have a job function that has an impact on the safety of school meals.

The professional standards requirements for each staff member are associated with the employee's job function(s), <u>not the local position title</u>. If an individual performs the functions described for a position but has a different title than the one used in the USDA professional standards, the requirements still apply to the person regardless of the position title.

Job Position Descriptions That Indicate Training Requirements

The following job position descriptions are used to determine the amount of training hours each employee is required to have each year:

School Nutrition Program Directors (Program Directors)

Employees who are directly responsible for the management of the day-to-day operations of school food service for <u>all</u> participating schools under the jurisdiction of the contracting entity, including employees who are contracted to serve as the director for a SNP on behalf of the CE.

Program director responsibilities typically include, but are not limited to, administration, program implementation, monitoring, and evaluation of the following: sanitation, food safety, employee safety, nutrition and menu planning, food production, facility layout and design, equipment selection, procurement, financial management, recordkeeping, program accountability, marketing, customer service, nutrition education, general management, personnel management, and computer technology.

School Nutrition Program Managers (Program Managers)

Employees who are directly responsible for the management of the day-to-day operations of school food service for a participating school including employees who are contracted to manage a SNP on behalf of the CE. A school nutrition program manager, as defined in this section, may be the manager for more than one participating school, but <u>not all</u> of the participating schools.

Other School Nutrition Program Employees (Other Program Employees)

Employees without managerial responsibilities who are involved in day-to-day operations of school food service for a participating school, including employees who are contracted to assist in the day-to-day operations of the program on behalf of the CE. Staff classified as other school nutrition program employees, as defined in this section, may work in more than one participating school.

Continuing Education/Training, Special Situations

The following guidance will assist CEs in applying the professional standards in special situations.

Assistant Director for SNP

If the duties of the Assistant Director are comparable to those of a program manager, the assistant director must, at a minimum, complete the annual

training required for a program manager. If the duties are not comparable, the assistant director must complete the annual training required for other program staff.

Employees and Contracted Food Service Employees in Charter Schools with Locations in More Than One Geographic Area

The job position descriptions and training hour requirements also apply to CEs that have participating sites that are managed and/or operated in different locations across the state even if a third party manages and/or operates those programs. In these cases, (1) a program director may be assigned to one site, a group of sites, or all sites; (2) a program manager may be assigned to one site or a group of sites but cannot be the program manager for all sites.

Employee Assigned Limited Program Tasks

Employees, including office staff members, who provide other support for the school nutrition program or process free and reduced-price meal applications for a short period of time during the school year are not required to meet the annual professional standards for training. However, the CE must still ensure that these individuals receive adequate training specific to the tasks they perform.

Employees with Multiple Functions/Positions

For SNP employees who share program director and program manager roles and responsibilities, the CE must use the following guidance.

- If the person holds a position that encompasses more than one job position description, the person must meet the highest level of professional standards.

- If an employee serves more than one position in the same CE or multiple CEs as described in this section, the employee must meet the highest set of professional standards.

- If school nutrition program director duties are performed by the program manager, the manager is expected to meet the program director training professional standards.

- When a CE with a smaller student enrollment or with only one site does not have a designated program director, the person who plans, administers, implements, monitors, and evaluates all aspects of the school nutrition program for the CE must meet the program director professional standards for training even if the person's major responsibilities are not fulfilling the program director's responsibilities.

Employees Working Under an Annual Contract

The duration of the contract does not affect the training requirements.

Funding Source for Employee Salary

The training standards apply to staff whose salaries are paid, partially paid, or not paid by the SNP.

General Training Not Related to SNP Operation

General training provided to SNP staff that does not address topics relevant to the operation of the SNP cannot be counted toward meeting the continuing education/training professional standards requirements.

This includes, but is not limited to, in-service training provided at the beginning of the school year or during the school year.

For Example: The following training topics are unlikely to be relevant to SNP operation as the content does not relate to the tasks the SNP staff must perform:

- Record keeping related to teacher gradebooks
- Integrating writing into all content areas
- Understanding the learning needs of diverse learners

However, the following topics may be relevant to the operation of the SNP if the content of the presentation relates to the tasks the SNP staff must perform:

- Process for submitting timesheets
- Benefits update
- Conflict of interest procedures

Local Wellness Coordinator

If the local wellness coordinator is not involved in the day-to-day operations of the SNP, the coordinator is not expected to meet the annual training requirements.

Part-Time Employees of the SNP (20 Hours or More)

Employees, including office staff, working on program activities for 20 hours or more per week throughout the school year must meet the professional standards for training.

The CE is not required to track the training provided to SNP employees who work less than 20 hours a week under the professional standards requirements. However, the CE must still provide all employees appropriate training so that they are able to perform the work assigned to them. TDA recommends that the CE use the same documentation method(s) for all employee training whether the training falls under the professional standards requirements or not.

Program Directors or Program Managers Providing Training

If program directors or managers provide continuing/education training, the directors or managers providing the training may count the training toward their required hours of training. However, if the program director or manager provides the same training multiple times, only the first instance may count toward the program director's or program manager's required training hours for the school year.

Refresher Training Provided Annually

Refresher training that must be completed each school year, such as civil rights or food safety, may be counted each year. While the training may cover some of the same topics as previous years, there will also be updated information for the current year.

Support Personnel, Delivery Staff

The program director must work with managers and staff to determine the training needs for delivery staff. If the food delivery employee preforms tasks associated with safe food storage and transportation, the employee is expected to complete annual training on topics such as proper handling, delivery, and storage of perishable food products to ensure the safety of school meals and

prevent food waste. If delivery staff do not perform these types of tasks, training is not required under the professional standards requirements.

Support Personnel

Employees who are not involved in program operation are not required to meet the training standards. This includes personnel such as janitorial custodians who are not involved in food preparation or food service.

Staff with Cognitive Disabilities

All SNP employees must receive the required training. This includes staff members with cognitive disabilities whether they work full time or part time. In appropriate circumstances, training events may be tailored to meet the employee's abilities and duties. However, all training opportunities should be made available to all staff in order to avoid discriminatory practices.

Temporary, Substitute, or Acting Employees and Volunteers

Temporary, substitute, or acting employees[4] are not required to meet the professional standards for training. Volunteers are also not required to meet the professional standards for training. However, the CE must ensure that these short-term employees and volunteers receive the training necessary to perform assigned tasks.

Vended Meal Provider

Vendors that provide pre-plated meals and do not perform program operation or management tasks are not required to meet the professional standards for training. However, the CE is responsible for ensuring that a vendor providing pre-plated meals has the knowledge and skills to supply safe and nutritious meals that meet the meal pattern and dietary specifications.[5]

Training Design

Costs Associated with Training

The CE may charge all reasonable and allowable costs to the nonprofit school food service account for training but must not pay for the cost of college credits incurred by an individual to meet the hiring standards.[6]

Determining the Amount of Training Time to Credit

The amount of time an employee participates in learning activities during a continuing education/ training event is the amount of time that credits toward the yearly amount of training hours—i.e., seat time. Time used for breaks, meals, and other non-learning activities does not count toward the yearly amount of training hours.

Focus of Training

Training must be job-specific and is intended to help employees perform their duties well. Training is expected to fall within the professional standards' learning categories, topics, subtopics, and objectives _and_ to be appropriate to the work conducted by the employee. See the _USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart_ in this section for additional information on nutrition program-related learning categories, topics, subtopics, and objectives.

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[4] Temporary or substitute employees are short-term workers, not employees who work over an extended period of time.

[5] In determining if a vending contractor meets this exception, the CE should review the roles and responsibilities for the vendor to make sure it is not preforming operational or management responsibilities.

[6] See the _Administrator's Reference Manual, Section 16, Financial System_ for additional information on reasonable costs.

Format of Training Events

Training events may be conducted in a variety of formats. This includes, but is not limited to, the following:

- Conference presentations
- Hands on training
- Onsite training or workshops
- Video conferencing
- Webinars or web-based training events
- Workshops

Local, State, or Other Funding Source Training Requirements

If other governing or administering agency rules and/or regulations require training on specific topics or required hours, CEs must also meet those requirements as prescribed. If rules and regulations permit, dual crediting may be applied—that is, applying the same training hours to meet required hours for both sets of rules and regulations.

Selecting Program Director Training

Training for program directors includes, but is not limited to, administrative practices including applications, certification, verification, meal counting, and meal claiming procedures.

Sources for Training

Regulations do not require that training sources be provided by specific agencies, organizations, or individuals. However, it is the CE's responsibility to ensure that all training opportunities focus on nutrition-related topics[7] and are conducted by knowledgeable nutrition sources.

Nutrition program-related training may be provided by, but is not limited to, the following sources:

- Education Service Centers (ESCs)
- Local school nutrition program (in house)
- Nutrition conferences
- Nutrition focused vendors
- Nutrition organization
- Other knowledgeable nutrition sources
- State or federal agency
- Texas Department of Agriculture (TDA)

Number of Training Hours for Each Position Type

The minimum amount of training required for employees is dependent upon on the employee's daily job functions and responsibilities for the assigned position as described in this section. All training must be job-specific and help the employee fulfill the employee's job functions and responsibilities.

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[7] As defined by the *Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives* subsection in this section.

CEs may apply staff excess training hours received during one school year to the previous or next school year as demonstrated in the *Tracking Continuing Education/Training Chart Over a One-Year or Two-Year Cycle Chart*.

However, this flexibility is not intended to be used to delay training so that CE staff only receive training every two years. Instead, it is intended to offer flexibility to assist the CE in managing and fostering long-term training goals at the local level. CE staff are required to receive some training each year.

Tracking Continuing Education/Training Over a One-Year and Two-Year Cycle Chart*				
	SY 2017-2018 **July 1-June 30**	**SY 2018-2019** **July 1-June 30**	**SY 2019-2020** **July 1-June 30**	**SY 2020-2021** **July 1-June 30**
One-Year Cycle				
Program Director:	12 hours	12 hours	12 hours	12 hours
Program Manager:	10 hours	10 hours	10 hours	10 hours
Program Staff:	6 hours	6 hours	6 hours	6 hours
Two-Year Cycle				
Program Director:	12 hours + 12 hours = 24 hours total			
Program Manager:	10 hours + 10 hours = 20 hours total			
Program Staff:	6 hours + 6 hours = 12 hours			
	Program Director: 12 hours + 12 hours = 24 hours			
	Program Manager: 10 hours + 10 hours = 20 hours			
	Program Staff: 6 hours + 6 hours = 12 hours			
		Program Director: 12 hours + 12 hours = 24 hours		
		Program Manager: 10 hours + 10 hours = 20 hours		
		Program Staff: 6 hours + 6 hours = 12 hours		

* Staff are required to receive some continuing education/training every year even if tracking continuing education/training across two years.

Continuing Education/Training Implementation Timeline

The *Continuing Education/Training Minimum Hours Chart* in this section provides specific information on the amount of training for each type of SNP position:

Continuing Education/Training Minimum Hours Chart	
Position	**Amount of Continuing Education/Training**
Program Directors	12 hours each school year (July 1 to June 30) **Specific to Food Safety** **Program Directors Employed Prior to July 1, 2015** For SY 2015-2016 8 hours food safety training within 5 years of July 1, 2015 or 8 hours food safety training by June 30, 2016 and After SY-2015-2016 8 hours of food safety training within five years of the date of the program director's last completed 8 hours of food safety training. **Program Directors Employed On or After July 1, 2015** When Employed 8 hours of food safety training within 30 calendar days of his or her start date and After Hiring 8 hours food safety training within five years of the date of the program director's last food safety training. Food safety training taken to meet the 8-hour requirement may be included in the program director's yearly required continuing education/ training hours.
Program Managers	10 hours each school year (July 1 to June 30)
Other Program Employees Working 20 Hours or More Each Week	6 hours each school year (July 1 to June 30)
Other Program Employees Working Less Than 20 Hours Each Week (Part time employees)	4 hours each school year (July 1 to June 30)
Any Program Employee Hired After January	Half (½) of the hours required for role/position for each school year (July 1 to June 30) except for requirements related to food safety

Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives

All continuing education/training opportunities are expected to fall under one or more of four subject categories:

1. Nutrition
2. Operations
3. Administration
4. Communication/Marketing

Each category is further subdivided into topics and subtopics and assigned a code so that CEs can track the topics addressed in the training provided to employees. Each category is assigned a list of learning objectives appropriate to the category.

When assigning the appropriate designations, only those areas that are well covered in the training event should be selected. The USDA *Learning Categories, Topics, Subtopics, and Objectives by Code Chart* in this section provides detailed information on the categories, topics, subtopics, and learning objectives by assigned code.

USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart
1000 Nutrition
1100 Menu Planning
Employee will be able to effectively and efficiently plan and prepare standardized recipes, cycle menus, and meals, including the use of USDA Foods, to meet all Federal school nutrition program requirements, including the proper meal components.

1110	USDA Nutrition Requirements	Plan menus that meet USDA nutrition requirements for reimbursable meals, including calculating meal components.
1120	Cycle Menus	Plan cycle menus that meet all rules. Consider cost, equipment, foods available, storage, staffing, student tastes, and promotional events.
1130	Local Foods/Farm to School	Utilize local food sources, especially Farm to School, when possible.
1140	Standardized Recipes	Write standardized recipes and use USDA Food Buying Guide for School Nutrition Programs (FBG).
1150	Menu Analysis	Analyze menus for school meal pattern requirements.
1160	Special Diets, Including Food Allergies	Plan meals to accommodate students requiring special diets, including food allergies.
1170	USDA Foods	Plan for effective use of USDA Foods.

USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

1200 Nutrition Education

Employee will be able to utilize resources to prepare and integrate age/grade appropriate nutrition education curriculum with school nutrition program.

1210   Nutrition Activities
Plan age/grade appropriate nutrition education activities using USDA Team Nutrition materials when possible.

1220   Classroom and Cafeteria Integration
Integrate nutrition education curriculum with school nutrition program, utilizing the cafeteria as a learning environment. (Including Team Nutrition resources.)

1230   School Gardens
Support school gardens as a means to nutrition education.

1300 General Nutrition

Employee will be able to understand the Dietary Guidelines for Americans, USDA Foods guidance concepts and general nutrition principles.

1310   Dietary Guidelines for Americans, MYPLATE and School Nutrition
Relate the Dietary Guidelines and USDA food guidance (such as MyPlate) concepts to the goals of the school nutrition programs.

1320   General Nutrition
Understand general nutrition concepts that relate to school meals, such as whole grains, sodium, etc.

2000 Operations

2100 Food Production

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.

2110   Standardized Recipes
Understand and effectively prepare food using a standardized recipe

2120   Food Production Records
Complete a food production record and other required paperwork.

2130   Culinary Skills
Develop culinary skills necessary for school meal preparation

2140   Use and Care of Equipment
Properly use and care for equipment.

2150   CN Labeling, Crediting
Understand CN Labeling, product formulation statements and/or appropriate crediting information for school meal pattern.

2200 Serving Food

Employee will be able to correctly and efficiently serve food portions to meet all USDA school meal pattern requirements and encourage healthy food selections including those for special diets.

2210   Portion Sizes/Special Diets
Identify/serve portions of food items according to school meal pattern requirements and diet restrictions.

2220   Offer VS Serve
Use Offer Versus Serve correctly.

2230   Maintaining Food Quality and Appearance
Serve food to maintain quality and appearance standards.

2240   Serving Lines
Manage serving lines for clean and efficient operation.

2300 Cashier and Point of Service (POS)

Employee will be able to efficiently operate and utilize a Point of Service (POS) system, ensuring correct application of reimbursable meal components, Offer Versus Serve, and confidential student eligibility identification in a financially responsible manner.

2310   Reimbursable Meals
Count reimbursable meals according to meal pattern requirements (including Offer Versus Serve) and eligibility status.

2320   POS Financial Responsibility
Use financial responsibility at Point of Service.[8]

2330   Free or Reduced Identification
Apply proper measures to prevent overt identification of students receiving free or reduced-price meals.

2400 Purchasing/ Procurement

Employee will be able to effectively and efficiently implement purchasing procedures and practices in order to appropriately and best utilize supplies and USDA Foods to meet menu requirements and comply with all Federal, State, and local regulations.

2410   Product Specifications
Develop product specifications to best meet menu requirements.

2420   Bid Solicitation and Evaluation
Solicit, receive, and evaluate bids for award in compliance with Federal, State, and local regulations

2430   Purchase Food, Supplies, and Equipment
Purchase food, supplies, and equipment through vendors, meeting CE specifications in compliance with Federal, State, and local procurement regulations and availability of USDA Foods.

2440   Food and Supplies Orders
Generate food and supply orders.

2450   Cooperative Purchasing Groups
Identify possible cooperative purchasing groups and geographic preference options.

2460   Contracts with Food Service Management Company
Develop and monitor contract(s) with food service management company, and/or others.

2500 Receiving and Storage

Employee will be able to ensure proper inventory management including correct delivery and storage of inventory, and that which has been placed on hold or recalled.

2510   Inventory Management
Develop processes for inventory management.

2520   Receiving and Storage
Apply safe and effective inventory receiving and storage procedures.

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[8] This objective would address such procedures as how transactions are handled at the point of service, for example: method in which cash is handled on receipt and until deposits are made; accounting method for recording revenue; making change.

2530	Hold and Recall	

Understand hold and recall procedures.

2600 Food Safety and hazard Analysis and Critical Control Point (HACCP)[9]

Employee will be able to effectively utilize all food safety program guidelines and health department regulations to ensure optimal food safety.

2610 HACCP
Practice (Follow) a HACCP-based program.

2620 Food Safety-General
Practice general food safety procedures.

2630 Federal, State and Local Food Safety Regulations
Practice Federal, State, and local food safety regulations and guidance.

2640 Food Safety Culture
Promote a culture of food safety behaviors in the school community (includes training on food allergens).

3000 Administration

3100 Free and Reduced-Price Meal Benefits

Employee will be able to effectively certify, process, and verify free and reduced-price meal eligibility benefits in accordance with Federal and State regulations related to nutrition programs. Understand and apply the Community Eligibility Provision (CEP) to eliminate the administrative burden of school meal applications and be able to serve meals at no charge.

3110 Eligibility
Certify, process, and verify free and reduced-price meal eligibility benefits in compliance with Federal regulations.

3120 Direct Certification
Understand and practice direct certification procedures by your state.[10]

3130 Community Eligibility Provisions (CEP)
Understand and apply the Community Eligibility Provision (CEP).

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[9] Hazard Analysis and Critical Control Points (HACCP)
[10] See *Administrator's Reference Manual, Section 4, Eligibility Determination* for additional information on this topic.

USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

3200 Program Management

Employee will be able to effectively manage staff and resources; prepare for administrative reviews, emergency programs; and utilize standard operating procedures.

3210	Staff Management	
	Manage staff work including scheduling.	
3220	Standard Operating Procedures	
	Oversee standard operating procedures for routine operations.	
3230	Healthy School Environment	
	Evaluate and utilize resources to promote a healthy school environment.	
3240	Emergency Plan	
	Develop and implement emergency and disaster plans as needed.	
3250	Water, Energy, and Waste Management	
	Manage water, energy, and waste.	
3260	Administrative Review	
	Prepare for administrative reviews.	

3300 Financial Management

Employee will be able to manage procedures and records for compliance with resource (financial) management with efficiency and accuracy in accordance with all Federal, State, and local regulations, as well as the administrative review.

3310	Meal Counting, Claiming, Managing Funds
	Implement a system of checks and balances to ensure accuracy and integrity of meal counting and claiming, funds collected, and record keeping.
3320	Compliance with Regulations/Policies
	Establish and document appropriate accounting procedures for all revenues and expenses, ensuring that all procedures comply with federal, state, and local regulations and Administrative Review.
3330	Budgets
	Prepare a budget that appropriately reflects financial goals.
3340	Financial Analysis
	Analyze financial statements and accounting procedures to make informed financial decisions and ensure alignment with budget and regulations.
3350	Pricing
	Calculate and recommend prices for meals and other food items to CE authorities, maintaining compliance with Federal, State, and local guidelines.
3360	Communicate Financial Information
	Communicate financial goals, status, and other data to appropriate CE and state authorities.

USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

3400 Human Resources and Staff Training

Employee will be able to implement human resources management practices through maintenance and familiarity with current personnel policies and procedures and support employees through training and retention strategies.

3410   Human Resources Management
Understand and apply human resource management practices.

3420   Policies and Procedures
Implement current personnel policies and procedures.

3430   Training Plans and Tracking
Develop employee training plans, including a plan for tracking training.

3440   Retention, Promotion, and Recognition
Implement a system for employee retention, promotion, and recognition.

3450   Employee Health, Safety and Wellness
Foster employee health, safety, and wellness (includes training on First Aid and Cardiopulmonary resuscitation [CPR]).

3500 Facilities and Equipment Planning

Employee will be able to evaluate school nutrition program equipment and facilities to ensure maximum efficiency and availability of healthy food choices.

3510   Facility and Equipment Planning
Evaluate/plan facilities and equipment to meet program goals.

3520   Equipment Purchasing and Maintenance
Maintain plans for purchasing and maintaining equipment.

4000 Communication/Marketing

4100 Communications and Marketing

Employee will be able to develop plans that include involvement with school and community members, empower school nutrition leaders, and address excellent customer service.

4110   Strategic and Marketing Plans
Develop strategic plans and marketing plans that reflect program goals and enhance interaction with stakeholders.

4120   Program Promotion
Promote the Child Nutrition Program (CNP).

4130   Customer Service
Empower school nutrition staff to provide excellent customer service.

4140   Communication Skills
Develop communications skills.

4150   School and Community Communication
Communicate within the school, CE, and the community through multiple approaches to inform and educate stakeholders.

4160   Smarter Lunchrooms Techniques
Create an environment that engages students to select and consume healthy foods with minimum waste, including Smarter Lunchroom[11] techniques.

Annual Civil Rights Training

The annual civil rights training may be counted toward meeting the training standards.

Unacceptable Topics for the Continuing Education/Training Professional Standards (Training Standards)

The following topics do not credit toward meeting the training standards:

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[11] Resources on Smarter Lunchroom practices are available at *www.SquareMeals.org* and *www.smarterlunchrooms.org/*.

- Motivational speeches/training

- Advocacy training

- General leadership training

  [Exception: Leadership training that focuses on management areas in the approved USDA professional standard learning topics and objectives may count toward the training standards.]

- General staff meetings

  [Exception: Training on acceptable topics may be included in general staff meetings. In this case, the time dedicated to the training may be counted toward the training standards.]

Food Safety Training
Food safety training must be current as defined in the *Continuing Education/Training Minimum Hours Chart*.

CEs will find that there are a wide range of possible sources for food safety training, including, but not limited to, the following:

- Accrediting agencies or organizations

- City, county, and state agencies

- Education service centers (ESCs)

Hiring Professional Standards (Hiring Standards) for Program Directors
The hiring standards for program directors described in this subsection apply to employees hired on or after July 1, 2015 or employees who were hired for a position that was advertised after July 1, 2015.

Hiring standards for program directors are based on total student enrollment for the CE for all schools participating in the program[12]—all students enrolled in all CE sites operating a CNP even if the sites are located across the state. Total enrollment should be based on the most current October enrollment data.

> For Example: A charter school system has schools located in Dallas, El Paso, Fort Bend, and San Antonio. The program director hiring standards are determined by the total enrollment across all of the CE's schools participating in the program.

CEs must not hire any individual for the program director position unless that person meets the applicable qualification standards.[13]

Special Situations, Hiring Program Directors
The following guidance addresses special situations related to the professional standards and hiring program directors.

Date of Hiring

The actual date the program director is hired determines if the hiring standards apply.

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[12] See the *Education Professional Standards for Program Directors* subsection in this section for the specific student enrollment ranges.
[13] See *Hiring Flexibilities for CEs with a Total Student Enrollment of 2,499 or Less* subsection in this section for additional information on the program director hiring exception for very small schools.

Hired and Employed <u>Before July 1, 2015</u>

The hiring standards for program directors as described in this section do not apply in the following circumstances:

1. Program directors who continue to be employed in their current CEs when the program director was hired and employed before July 1, 2015

2. Program directors who move to another position within the CE that hired and employed them before July 1, 2015

   For Example: A program manager who was employed by the CE prior to June 30, 2015 was promoted to program director on August 1, 2015. This staff member is not required to meet the hiring standards for program directors hired on or after July 1, 2015.

3. Program directors who move to another CE with the same or lower total student enrollment level as the CE that employed them as of June 30, 2015

   For Example: A program director who is employed by a CE with a total student enrollment of 3,500 on June 30, 2015 is hired by another CE with a total student enrollment of 4,200 on January 5, 2016. This staff member is not required to meet the hiring standards for program directors hired on or after July 1, 2015 because both CEs are in the 2,500 to 9,999 group.

4. Program directors who have taken positions that were advertised prior to July 1, 2015

Hired and Employed <u>On or After July 1, 2015</u>

The professional standards for hiring program directors as described in this section apply to program directors hired on or after July 1, 2015 unless the new program director meets one of the exceptions described in the *Hired and Employed Before July 1, 2015* subsection in this section.

Contracted Services

The hiring standards requirements for program directors <u>include</u> personnel employed by food service management companies and other vendors engaged in program operation and/or program management.

Food Service Management Company

If an FSMC operates an SNP for a CE, the CE must request documentation from the FSMC that demonstrates that the FSMC is in compliance with program director hiring and training standards. This documentation may also be requested for an administrative review. It is the CE's responsibility to ensure that the FSMC meets these requirements. The CE must include this requirement in its FSMC solicitation and contract.

Personnel Employed by a CE with Locations Across the State

If a CE has multiple schools located in different areas of the state, the hiring standards for the program director are based on the total student enrollment for the CE across <u>all</u> locations participating in the program.

Personnel Employed by More Than One CE

If an individual is employed by more than one CE, the individual must meet the highest hiring standards based on the largest CE's total student enrollment for schools participating in the program.

Shared Program Director Responsibilities

When the responsibilities that are normally associated with the director's position are divided among multiple staff members, the person with the majority of the director's job responsibilities must fulfill the program director hiring standards.

Education and Experience for Program Directors

The educational and relevant experience requirements for program directors hired on or after July 1, 2015, are based on the CE's total student enrollment. For hiring standards, total student enrollment is total student enrollment from the most current October at sites participating in the school nutrition program. If CEs have limited employment resources and have difficulty identifying a candidate for the program director position who will meet the educational and program experience requirements, CEs should contact their Regional ESC or TDA[14] for assistance.

CE Total Student Enrollment of 2,499 or Less Minimum Educational and Experience Background

- Bachelor's degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or related field). School nutrition experience is preferred, but not required.

    or

- Bachelor's degree or equivalent educational experience in any major and 1 year of relevant **paid** food service employment experience. School nutrition experience is preferred, but not required.

    or

- Associate degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration

> **Information Box 1**
>
> **Hiring Standards Terms**
>
> **Equivalent Educational Experience** refers to college credits completed by an individual who does not have a bachelor's or an associate degree: at least 60 college credits for an associate degree or a minimum 4 years of full-time college-level course work (about 120 hours) for a bachelor's degree.
>
> **Related Field** refers to other college majors that would provide an applicant specific knowledge and skills that are relevant for a school nutrition program director. This includes, but is not limited to, food science, dietetics, food and nutrition, food service management, family and consumer sciences, nutrition education, culinary arts, business, community nutrition, and marketing, and hospitality management.
>
> **Relevant School Nutrition Program Experience for CEs with a Total Student Enrollment of 2,500 or More** refers to previous work experience in NSLP, SBP, or any of the child nutrition programs which indicates the applicant's familiarity with USDA's school nutrition program.
>
> **Relevant Food Service Employment Experience for CEs with a Total Student Enrollment of 2,499 or Less** refers to previous work experience in the food service industry that demonstrates the applicant's familiarity with the operation and/or management of a food service establishment.

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[14] The Contact Information for the Texas Department of Agriculture (TDA), Food and Nutrition page at the beginning of this manual provides information on how to contact TDA directly.

in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field) <u>and</u> at least 1 year of relevant **paid** food service employment experience. School nutrition experience is preferred, but not required.

or

- High school diploma (or GED) <u>and</u> 3 years of relevant **paid** food service employment experience. School nutrition experience is preferred, but not required.

Program directors that are hired and do not have an associate degree are strongly encouraged to work toward attaining an associate degree.[15]

Hiring Flexibility for CEs with a Total Student Enrollment 2,499 or Less

CEs with a total student enrollment of *2,499* students or less that have made attempts to hire a qualified program director but have been unable to do so may apply for flexibility to hire an individual if all of the following conditions exist:

1. CE's total student enrollment is 2,499 or less.

2. Candidate <u>has</u> the required educational experience for a CE with a total student enrollment of 2,499 or less.

3. Candidate <u>does not have</u> the required amount of **paid** food service employment experience based on the candidate's educational experience for a CE with a total student enrollment of 2,499 or less.

With TDA approval, the CE may hire a candidate who meets each of the following standards:

- CE's total student enrollment is 2,499 or less.

- Candidate <u>has</u> the required educational experience for a CE with a total student enrollment of 2,499 or less.

- Candidate <u>has</u> the required amount of food service experience as an **unpaid** volunteer based on the candidate's level of education for a CE with a total enrollment of 2,499 or less.

- CE develops and implements an approved written plan to ensure the candidate will acquire relevant School Nutrition Program (SNP) and food service experience.

    Approvable plans include, but are not limited to, the following types of activities to assist the candidate in acquiring relevant experience: professional training, coaching, shadowing, internship, and peer-to-peer mentoring.

To apply for this flexibility, the CE must submit the *Hiring Professional Standards Exception Request for Contracting Entities (CEs) with a Total Student Enrollment of 2,499 or Less*. Access to the form is available through Texas Unified Nutrition Programs System (TX-UNPS) | Applications | Download Forms, *Form ID: SNP-000, Request for*

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[15] The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.

Exemptions/Waivers for Program Operation. TDA will notify the CE if the flexibility is approved.

A CE must receive TDA approval before hiring a candidate that qualifies under this flexibility.

In all cases, CEs must retain documentation that demonstrates the candidate's education and food service experience on the date of hire; TDA's approval to hire the candidate; and the implementation of the approved plan.

Additional Hiring Flexibility for CEs with a Total Student Enrollment of 500 or Less

CEs with a total student enrollment of 500 students or less that have made attempts to hire a qualified program director but have been unable to do so may apply for additional flexibility to hire an individual meets all requirements for CEs with a total enrollment of 2,499 or less except the requirement related to relevant **paid** food service experience.

With TDA approval, the CE may hire a candidate who meets each of the following standards:

1. CE's total student enrollment is 500 or less.

2. Candidate has the required educational experience for a CE with a total student enrollment of 2,499 or less.

3. Candidate does not have the required amount of **paid** food service experience based on the candidate's education experience for CE with a total student enrollment of 2,499 or less.

4. CE develops and implements an approved written plan to ensure the candidate will acquire relevant School Nutrition Program (SNP) and food service experience.

   Approvable plans include, but are not limited to, the following types of activities to assist the candidate in acquiring relevant experience: professional training, coaching, shadowing, internship, and peer-to-peer mentoring.

To apply for this flexibility, the CE must submit the *Hiring Professional Standards Exemption Request for Contracting Entities (CEs) with Total Student Enrollment of 2,499 or Less*. Access to the form is available through the Texas Unified Nutrition Programs System (TX-UNPS) | Applications | Download Forms, *Form ID: SNP-000, Request for Exemptions/Waivers for Program Operation*. TDA will notify the CE if the flexibility is approved.

A CE must receive TDA approval before hiring a candidate that qualifies under this flexibility.

In all cases, CEs must retain documentation that demonstrates the candidate's education and food service experience on the date of hire; TDA's approval to hire the candidate; and the implementation of the approved plan.

Summary of Flexibilities, CEs with a Total Student Enrollment of 2,499 or Less Chart				
	Flexibility for Required Experience			
	Total Student Population			
Required Educational Experience	**2,499 or Less**		**500 or Less**	
Bachelor's degree in nutrition or related major	No flexibility needed		No flexibility needed	
Bachelor's degree in any other major	1 year of food service experience, **paid**	1 year of food service experience, **unpaid**	1 year of food service experience, **paid**	Less than 1 year of food service experience, **unpaid**
Associate degree in nutrition or related major	1 year of food service experience, **paid**	1 year of food service experience, **unpaid**	1 year of food service experience, **paid**	Less than 1 year of food service experience, **unpaid**
High school diploma or GED	3 years of food service experience, **paid**	3 years of food service experience, **unpaid**	3 years of food service experience, **paid**	Less than 3 years of food service experience, **unpaid**
Is Hiring Flexibility Needed?	NO	YES	NO	YES
Required to Receive Flexibility:				
Request submitted to and approved by TDA		✓		✓
Approved plan to ensure candidate achieves relevant SNP and food service experience		✓		✓
Approval from TDA before hiring candidate		✓		✓
Retention of documentation related to exemption approval and creating and implementing approved plan		✓		✓

CE Total Student Enrollment 2,500-9,999

Minimum Educational and Experience Background

- Bachelor's degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or related field).

  School nutrition experience is preferred, but not required.
      or
- Bachelor's degree or equivalent educational experience in any major <u>and</u> least 2 years of relevant school nutrition experience.
      or

- Associate degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field) <u>and</u> at least 2 years of relevant school nutrition experience.

Program directors that are hired and do not have a bachelor's degree are strongly encouraged to work toward attaining bachelor's degree.[16]

CE Total Student Enrollment of 10,000 or More

Minimum Educational and Experience Background

- Bachelor's degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field).

  School nutrition experience is preferred, but not required.

  or

- Bachelor's degree or equivalent educational experience in any academic major <u>and</u> at least 5 years' experience in school nutrition program management.

Program directors that are hired and do not have a master's degree are strongly encouraged to work toward attaining a master's degree.[17]

At least one year of management experience, preferably in school nutrition, is strongly recommended.

At least 3 credit hours at the university level in food service management plus at least 3 credit hours in nutritional sciences at time of hiring is strongly preferred.

The *Education Experience—Hiring Professional Standard Chart* provides a comparison of the hiring professional standards by total student enrollment size.

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[16] The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.
[17] The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.

Educational Experience—Hiring Professional Standards Chart (By Total Student Enrollment for Schools Participating in the Program)		
2,499 or Less[a]	**2,500-9,999**	**10,000 or More**
Bachelor's degree or equivalent educational experience[b] in a nutrition specific or related major[c] School nutrition experience[d] is preferred, but not required.		
or	or	or
Bachelor's degree or equivalent educational experience[b] in any academic major <u>and</u> at least 1 year of relevant food service employment experience[e]	Bachelor's degree or equivalent educational experience[b] in any academic major <u>and</u> at least 2 years of relevant school nutrition experience[d]	Bachelor's degree or equivalent educational experience[b] in any major <u>and</u> at least 5 years of experience in school nutrition program management
or	or	
Associate degree or equivalent educational experience[b] in a nutrition specific or related major[c] <u>and</u> at least 1 year of relevant food service employment experience[e]	Associate degree or equivalent educational experience[b] in a nutrition specific or related major[c] <u>and</u> at least 2 years of relevant school nutrition experience[d]	
or		
High school diploma (or GED) <u>and</u> at least 3 years of relevant food service employment experience[e]		

[a] Flexibility: CEs with a total student enrollment of 2,499 or less may request flexibility to hire a director that does not have the required relevant food service employment experience. Additional information on this flexibility is described in the CE Total Enrollment of 2,499 or Less subsection in this section.

[b] Equivalent Education Experience: At least 60 college credits for an associate degree or a minimum 4 years of full-time college-level course work (about 120 hours) for bachelor's degree.

[c] Related Field or Major: Academic major or concentration in food science, food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, community nutrition, and marketing, and hospitality management.

[d] Relevant School Nutrition Experience: Previous work in NSLP, SBP, or any of the child nutrition programs which indicates the applicant's familiarity with USDA's school nutrition program.

[e] Relevant Food Service Employment Experience: Previous work experience in the food service industry that demonstrates the applicant's familiarity with the operation and/or management of a food service establishment.

Tools to Assist with Professional Standards

USDA and TDA have developed the following resources to assist CEs in implementing the professional standards.

USDA Resource

- Professional Standards for School Nutrition Professionals
  Available at *www.fns.usda.gov/school-meals/professional-standards*

TDA Resources

- *Continuing Education/Training Tracking Record*—CEs <u>may</u> use this Excel form to track staff professional development hours.
  Available at *www.SquareMeals.org*

- *Hiring Professional Standards Exemption Request for Contracting Entities (CEs) With a Total Student Enrollment of 2,499 or Less*—CEs with a total

student enrollment of 2,499 or less <u>must</u> use this form if requesting an exemption to hire a program director that does not meet the professional standards requirements.

> Available through the *Download Forms* screen in the Texas Unified Nutrition Programs System (TX-UNPS) Applications.

- *Hiring Program Director Checklist*—CE <u>may</u> use this form to determine if a candidate for a program director hired after July 1, 2015 meets the professional standards requirement.

  > Available at *www.SquareMeals.org*

Records Retention

CEs are required to maintain an organized system of records retention that is accessible to appropriate CE employees and federal or state reviewers. TDA may request documentation for both offsite and onsite administrative review processes. CEs have the option to maintain records in paper or electronically.

All documentation or records must be kept on file for a minimum of five years for public and charter schools or three years for private schools, other nonprofit organizations, and residential child care institutions after the end of the fiscal year to which they pertain. If audit findings have not been resolved, the records must be maintained as long as required for the resolution of the issues raised by the audit.

Documentation Related to Training

CEs must maintain records that demonstrate compliance for employees required to meet training standards, including food safety training.

Food Safety Training

> While all employees may participate in food safety training, the CE must retain documentation that demonstrates that the program director has met the following standard. CEs need to ensure that records related to food safety training are kept for the full five years even if other records retention periods expire.

Information Box 2
Record Retention
Public and charter schools are required to keep documentation related to school nutrition programs for five years.
Private schools, other nonprofit organizations, and residential childcare institutions (RCCIs) are required to keep documentation for three years.

Existing Directors

> Completed eight hours of food safety training within 5 years prior to July 1, 2015 or eight hours of food safety training by June 30, 2016 <u>and</u> 8 hours of food safety training within five years of the date of the program director's last completed 8 hours of food safety training.

New Directors

> Completed eight hours of food safety training within 30 calendar days of the employment start date <u>and</u> 8 hours of food safety training within five years of the date of the program director's last food safety training.

Employee Training Under the Professional Standards Provisions

The CE must retain records that provide the following information for each person attending a training event:[18]

- Training event title and content[19] including topics/objectives

- Date and actual time participating in learning activities

- Source providing the training

Documentation includes, but is not limited to, attendance sign in sheets, continuing education/ training agendas, certificates of attendance, and other training documents. CEs may use any organized method of retaining this documentation that meets the requirements described in this subsection.

The categories of information captured in TDA's, *Continuing Education/Training Tracking Record* demonstrates what information must be retained and a method for doing this. TDA highly recommends using this form or a similarly organized method to make retrieval of documentation easier.

If an FSMC operates the SNP for the CE, the CE must be able to demonstrate that it has reviewed documentation for the training standards and ensured that the FSMC is compliant with the professional standards requirements.

Employees Who Work Less Than 20 Hours Per Week

Even though employees who work for less than 20 hours per week are not required to receive training under the professional standards provisions, the CE must still retain documentation that these staff members have received appropriate training for their assigned tasks. TDA recommends that the CE use the same documentation method(s) for all training whether the training falls under the professional standards requirements or not.

Documentation Related to the Hiring Standards

The CE must maintain records for all employees that demonstrate the following information:

- Name of each staff person

- Date hired

- Title/Position with a brief list of core responsibilities, including the employee's position title, i.e., nutrition program director, manager, kitchen staff, or other staff

- Employment status, i.e., full time, part time, substitute

Part Time Employees

- Average hours per week for all part time employees

Program Directors Hired on or after July 1, 2015

For all program directors hired on or after July 1, 2015, the CE must maintain records for program directors that demonstrate the following information:

– Highest level of education achieved, areas of study or focus as appropriate

– Years of school nutrition program experience

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18 This includes records for FSMC staff.
19 See the *Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives* subsection in this section for additional information on this topic.

Approved Under 2,499 Exemption

– Letter of approval and all documentation related to information provided to TDA in the request for an exemption

Transfer to Another Position within the CE or to a CE of the Same Size

– Documentation necessary to demonstrate that program director was employed by the CE's SNP prior to July 1, 2015

– Documentation demonstrating that the enrollment of the transfer location is in the same total enrollment group (2,499 or less; 2,500 to 9,999; or 10,000 or more) as the originating CE. Total enrollment should be based on the most current October enrollment data.

Appropriate documentation for the hiring standards includes, but is not limited to, college transcriptions (with social security number and other confidential information redacted) and resumes.

Compliance

TDA will review CE documentation related to professional standards during an administrative review or as appropriate to determine if the CE is meeting the hiring and training requirements. If the CE is not in compliance with the requirements, TDA may require a corrective action plan that demonstrates that the CE has developed approvable procedures and actions to correct noncompliance within a specified period of time.