

September New Directors' Webinar



Loria Hunter, Education Specialist II
2023 New Directors' Training
September 2023
ALSDE CNP School Programs



WebEx Recording

A collection of business-related icons and illustrations. In the center is a laptop. To its left is a calculator and a cup of coffee. To its right are several gold coins and a green banknote. In the foreground, there is a clipboard with a grid, a pen, and a document with a bar chart and a pie chart.

[CLICK HERE TO ACCESS THE WEBEX RECORDING](#)

Agenda



- Monthly Checklist
- CNP Financial Profile
- School Review Forms
- Reminders

Monthly Checklist



New Directors' Monthly Checklist September

Mark as (X) or N/A	Tasks	Date Completed/Notes
	*Submit claims for reimbursement by the 20 th day of the following month (delinquent after the 20 th day) if meals were served during the month of August.	
	Run the direct certification (DC) list in PowerSchool and the point of sales (POS). Compare lists to ensure DC eligibles are accurate in both systems.	
	Check AIM for DC unmatched students using selected data points. Compare unmatched list with enrolled student file.	
	Process online and hardcopy F/R meal applications. Send notification letters. (ongoing)	
	Inform households of 30 operating day carryover expiration.	
	Ensure that termination of benefits occurred in point of sales (POS) and paid status was communicated to PowerSchool if households did not submit new F/R application during 30-day carryover.	
	Conduct After School Snack Program (ASSP) review within the first 4 weeks of operation.	
	Conduct managers' meeting.	
	Conduct on site visits.	
	Plan Thanksgiving and Christmas menus. (optional)	
	Place orders for special holiday menu items. (optional)	
	Ensure end of fiscal year inventory is accurate and complete.	
	Make plans to attend the CNP Fall Directors' Conference.	
	Submit financial profile corrective action by September 30, if applicable.	
	Revise online application for any program changes (snacks, mealtimes, operating days).	

**Claims submitted during September may be delayed for payment due to end of the year closeout. Submit claims*

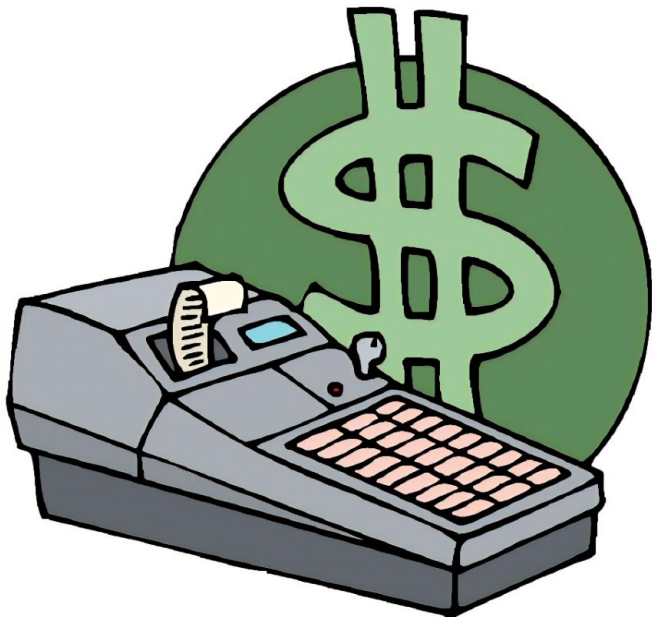
Monthly Checklist

- Submit August claim for reimbursement
- Continue to review DC list in PowerSchool and compare it to POS
- Check AIM for DC unmatched for students with questionable meal status
- Continue processing meal applications.
- Send notification letters to HH
- Inform HH of 30 day carryover expiration
- Ensure termination of benefits occur, as applicable
- Conduct ASSP review, if applicable
- Conduct staff meeting
- Conduct on site visits
- Plan holiday menus
- Place holiday menu item orders
- Ensure FY inventory is accurate and complete
- Make plans to attend fall conference
- Revise online application as needed

Child Nutrition Programs Financial Profile



Child Nutrition Programs Financial Profile



The Child Nutrition Program (CNP) Financial Profile is a summary report that reflects the financial averages and statistics based on individual school systems and statewide data.

The report is based on claims for reimbursement, pass-thru workbooks and financial information provided by the school system to the Alabama State Department of Education (ALSDE).

The report represents the school system's financial results for the prior three fiscal years (October 1 through September 30).

CNP Financial Profile



Preliminary CNP Financial Profile

FUND BALANCES AND RESULTS OF OPERATIONS

	FY 2020	FY 2021	FY 2022
Total Enrollment	2487	2501	2485
Total Revenues	\$1,613,455.48	\$2,190,128.03	\$2,168,690.07
Total Expenditures	\$1,638,542.65	\$1,826,016.84	\$2,141,169.32
Net Excess/Deficit	(\$25,087.17)	\$364,111.19	\$27,520.75
Ending Net Cash Resources	\$387,596.89	\$746,945.84	\$753,694.10
Average Monthly Expenditures	\$136,545.22	\$152,168.07	\$178,430.78
Operating Balance (Months)	2.8	4.9	4.2

REVENUE/ EXPENDITURE RATIOS

Expenditures As % of Total Revenue	101.55%	83.37%	98.73%
Total Food Expenditures	\$498,915.20	\$632,087.32	\$822,762.60
SWP Rebates	\$55,651.00	\$7,196.31	\$32,219.03
Other Rebates	\$0.00	\$0.00	\$0.00
Net Food Expenditures	\$443,264.20	\$624,891.01	\$790,543.57
Food As % of Total Revenue	27.47%	28.53%	36.45%
Total Labor Expenditures	\$936,971.19	\$939,547.30	\$979,394.31
Labor As % of Total Revenue	58.07%	42.90%	45.16%

PRODUCTIVITY

Annual Meal Equivalents Served	272,240	368,020	409,532
Revenue Per Meal	\$5.93	\$5.95	\$5.30
Total Expenditures Per Meal	\$6.02	\$4.96	\$5.23
Food Costs Per Meal	\$1.63	\$1.70	\$1.93
Labor Costs Per Meal	\$3.44	\$2.55	\$2.39
Meals Per Labor Hour	9.52	12.86	14.31

Miscellaneous

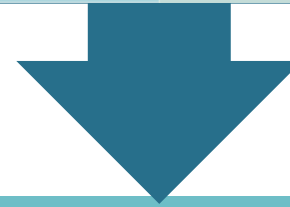
Total Lunches Served	148,594	205,625	224,578
% Free/Reduced Meals	71.46%	23.49%	95.23%
Number Of Free/Reduced Applications	1194	2501	2485
Free/Reduced Eligibles %	48.01%	100.00%	100.00%

Purpose of the CNP Financial Profile

The CNP Financial Profile report provides:

Data to assist superintendents and directors in improving their financial operations.

Critical information to ALSDE to identify areas for training and technical assistance.



The CNP Financial Profile should be examined and discussed by the key stakeholders which should include the superintendent, Chief School Financial Officer, and CNP Director.



Sections of the CNP Financial Profile

The CNP Financial Profile is divided into four sections:

- Fund Balances and Results of Operations
- Revenue/Expenditure Ratios
- Productivity
- Miscellaneous



Fund Balances and Results of Operations

The **Fund Balances and Results of Operations** section includes:

- Total Enrollment
- Total Revenues
- Total Expenditures
- Net Excess/Deficit
- Ending Net Cash Resources
- Average Monthly Expenditures
- Operating Balance (Months)



Total Enrollment

The **CNP Financial Profile** shows total enrollment for three prior fiscal periods for comparison.

The **Enrollment** is pulled from the claim for reimbursement.

The school food authority should:

- Verify that the enrollment data were reported accurately; and
- Determine if the trends are upward, downward, or consistent.

The comparisons should assist in planning.

- If enrollment and revenues are continuously declining, the SFA must implement a plan to increase revenue and decrease expenditures.



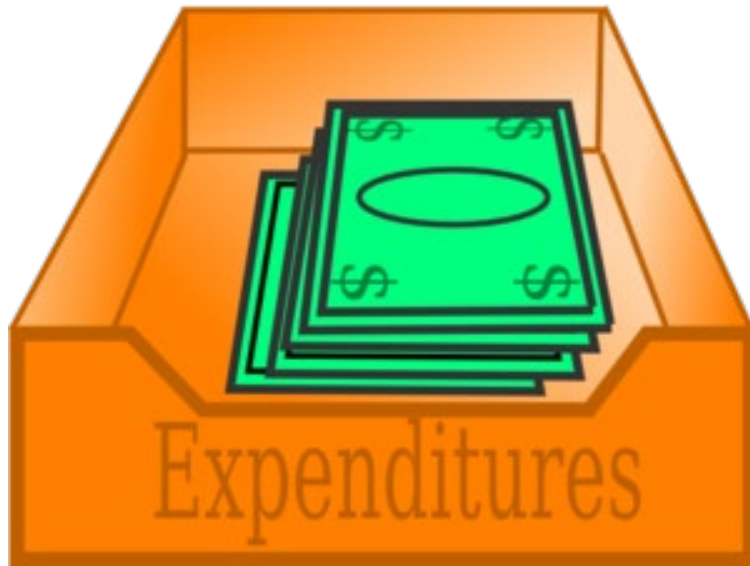
Total Revenues

The **CNP Financial Profile** shows revenue for three prior fiscal periods for comparison.

The **Total Revenues** is obtained from the financial data from the local education agency's accounting system.

(AIM Portal>LEA Accounting Tile)

Total Expenditures



The CNP Financial Profile shows expenditures for three prior fiscal periods for comparison.

The Total Expenditures is obtained from the financial data from the local education agency's accounting system.(AIM Portal>LEA Accounting Tile)

Net Excess/Deficit

The Net Excess/Deficit is obtained from the financial data from the local education agency's accounting system.

- **Net Excess** indicates that the school system's operation is profitable and efficient.
- **Net Deficit** is a critical indicator that the school system's operation is not profitable.

The school food authority must:

- Verify that the data reported are accurate; and
- Evaluate the efficiency or inefficiency of the program.



Ending Net Cash Resources



The Ending Net Cash Resources is obtained from the financial data from the local education agency's accounting system.



The Ending Net Cash Resources includes “all monies” that are available to or have accrued to a school food authority's nonprofit school food service account for the fiscal year less cash payable.

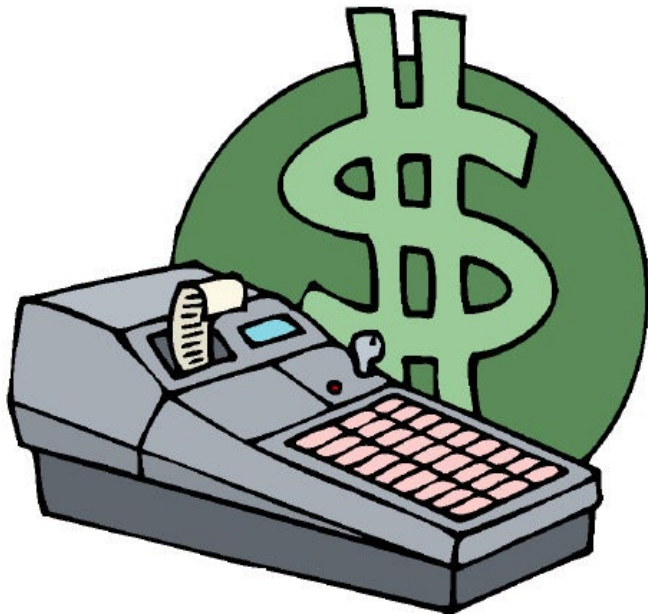


The Ending Net Cash Resources is a continuation of a school system's ongoing operating balance. Funds from a prior excess/deficit are carried forward into the current year.



Average Monthly Expenditures

Average Monthly Expenditures are calculated by dividing the total expenditures for fiscal year by twelve (12) months to display a monthly amount.



Total Expenditures	\$15,637,570.96
Divided by 12 months	12
Average Monthly Expenditures	\$1,303,130.92

Operating Balance (Months)

The **Operating Balance** (Months) is calculated by dividing the Ending Net Cash Resources by the Average Monthly Expenditures to display the number of operating months available in the Ending Net Cash Resources.

CNP Directors should monitor the Operating Balance (Months) to ensure funds are available to cover at a minimum one (1) month's operations but not exceed three (3) months of operations.



NOTE: If a school system exceeds three (3) months Net Cash Resources balance, a plan must be developed to reduce the Net Cash Resources balance below three (3) months of operations.



Operating Balance (Months)



Net Cash Resources	\$5,677,845.62
Average Monthly Expenditures	\$1,786,548.63
Number of months operating income available	3.2 months

Net Cash Resources	\$5,677,845.62
Average Monthly Expenditures	\$3,786,548.63
Number of months operating income available	1.5 months

Revenue/Expenditure Ratios

The Revenue/Expenditure Ratios section includes:

- Expenditures As a % of Total Revenue
- Total Food Expenditures
- Statewide Purchasing Rebates
- Other Rebates
- Net Food Expenditures
- Food As a % of Total Revenue
- Total Labor Expenditures
- Labor As a % of Total Revenue



Expenditures as a % of Total Revenue

The **Expenditures as a % of Total Revenue** is calculated by dividing **Total Expenditures** by the **Total Revenues**. It expresses the percentage of a school system's revenue attributed to its expenditures.

If the percentage is high or above 100%, a plan should be developed to either increase revenue or decrease expenditures.

Total Expenditures	\$18,946,820.08
Total Revenues	\$19,865,321.85
Expenditures as a percentage of Revenue	0.96%



Total Food Expenditures



The Total Food Expenditures is obtained from the financial data from the local education agency's accounting system.



The school food authority should verify that the data reported is accurate and should match the total of the following CNP recorded expenditure.

461 Purchased Food

463 Food Service Supplies

464 Food Processing Supplies

469 Other Food Supplies



Note: All school systems do not use all four (4) object codes.

Add the totals for the codes above that are applicable to your school system.

Statewide Purchasing (SWP) Rebates and Other Rebates



The Statewide Purchasing (SWP) Rebates and Other Rebates are obtained from the financial data from the local education agency's accounting system.

The school food authority should verify that the data reported is accurate and matches the total of the following recorded CNP Rebates (8993).

If your school system does not participate in SWP, your rebates should be reported as Other Rebates.

Net Food Expenditures

The Net Food Expenditures is calculated by subtracting the SWP Rebates and Other Rebates from the Total Food Expenditures.



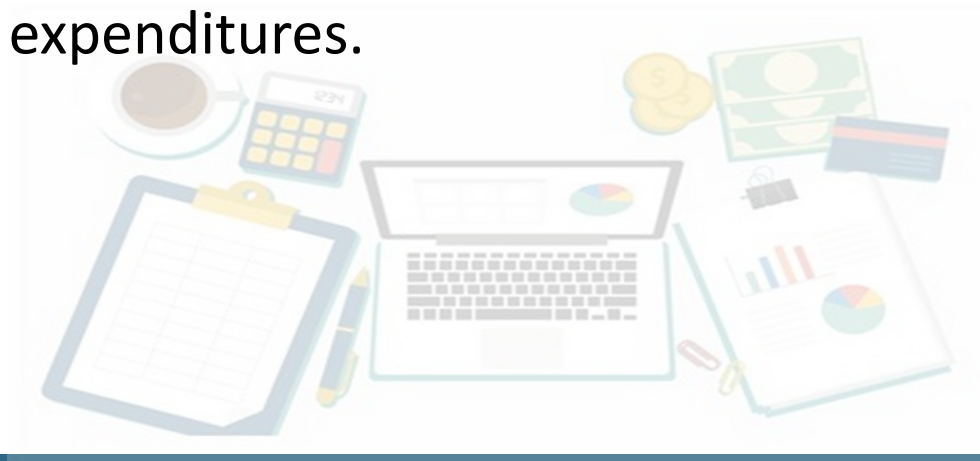
The **school food authority** should verify that the data reported is accurate.

Total Food Expenditures	\$9,165,477.56
SWP Rebates	\$398,354.87
Other Rebates	\$0
Net Food Expenditures	\$8,767,122.69

Food As a % of Total Revenue

The Food As a % of Total Revenue is a calculated figure that expresses the percentage of a school system's revenue that is attributed to its food expenditures.

If the percentage is high, the CNP Director will need to develop a plan to either increase revenue or decrease food expenditures.



Total Food Expenditures	\$9,165,477.56
Total Revenue	\$19,865,321.85
Food Expenditures as a percentage of Revenue	0.47 or 47%

Labor Expenditures

The Total Labor Expenditures is obtained from the financial data from the local education agency's accounting system.



The **school food authority** should verify that the data reported is accurate.

The school food authority should verify that the data reported is accurate and should match the total of the following CNP expenditure object codes:

- 001 - 199 Personal Services
- 200-299 Employee Benefits
- 210-219 Health Insurance
- 220-229 Retirement

Labor Expenditures: Continued



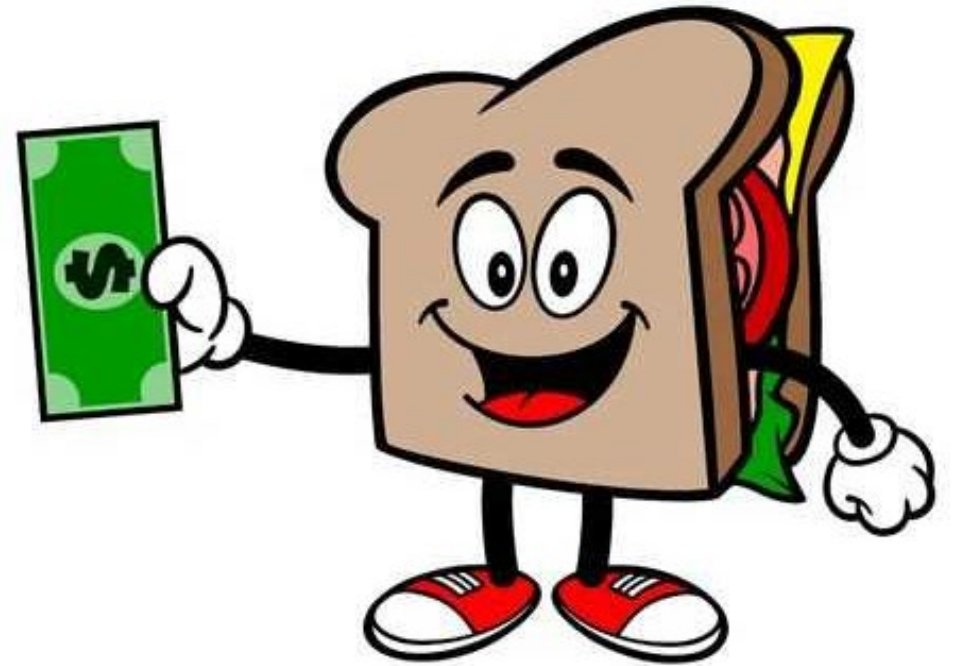
- 230-239 Social Security
- 240-249 Medicare
- 250-259 Unemployment Compensation
- 260-269 Workers Compensation
- 270-279 Life Insurance
- 280-289 Tuition Reimbursement
- 290-299 Other Employee Benefits

★ ★ **Note:** All school systems do not use all codes.
★ Add the totals for the preceding codes that are applicable to your school system.

Productivity

The **Productivity** section includes:

- Annual Meal Equivalents Served
- Revenue Per Meal
- Total Expenditures Per Meal
- Food Costs Per Meal
- Labor Costs Per Meal
- Meals Per Labor Hour



Labor As a % of Revenue

The **Labor as a % of Total Revenue** is a calculated figure that expresses the percentage of a school system's revenue that is attributed to its labor expenditures.

- If the percentage is high the CNP Director will need to develop a plan to either increase revenue or decrease labor expenditures.



Total Labor Expenditures	\$1,346,922.50
Total Revenue	\$2,579,587.16
Labor Expenditures as a percentage of Revenue	0.52 or 52%

Annual Meal Equivalents Served



The Annual Meal Equivalents Served is a calculated based on the total number of meals served and ala carte sales.



What is Meal Equivalent (ME)?

Meal Equivalent is a formula used to calculate the number of a specific meal type to equal one (1) meal.



Meal Equivalents are used to determine the profitability and efficiency of the food service operation.

Annual Meal Equivalents Served: Continued

The ME is calculated using the conversion listed below. The total for each meal type served is obtained from the claims for reimbursement. The à la carte sales total is obtained from the financial data from the local education agency's accounting system.

- 1 Lunch = 1 ME
- 3 Breakfasts = 2 ME
- 3 Snacks = 1 ME
- \$3.00 A la carte = 1 ME



Annual Meal Equivalents Served: Continued

Annual Meal Equivalents Served calculations are as follows:

All meals served and total a la carte foods sold from October 1 to September 30 of the fiscal period.

- Lunch ME is calculated by the number of lunches served multiplied by 1.
- Breakfast ME is calculated by the number of breakfasts served multiplied by 0.67.
- Snack ME is calculated by the number of snacks served divided by 3.
- A la carte ME is calculated by the total a la carte sales divided by 3.



Revenue per Meal



Revenue per Meal is calculated by dividing the Total Revenues by Annual Meal Equivalents Served. It is the amount the school food authority earns per Meal Equivalent.



NOTE: The school food authority should verify that the data reported is accurate and review practices to increase revenue.

Total Revenues	\$19,865,321.85
Annual Meal Equivalents Served	7,826,315
Revenue Per Meal	\$2.54

Total Expenditures per Meal



Total Expenditures per Meal is calculated by dividing Total Expenditures by the Annual Meal Equivalents Served.

- If a school systems Total Expenditures per Meal exceeds the Revenue per Meal, the **food** and **labor** costs should be evaluated.



NOTE: The school food authority should verify that the data reported is accurate.

Food Costs per Meal

Food Costs per Meal is **calculated** by dividing the Total Net Food Expenditures by the Annual Meal Equivalents Served.

NOTE: The school food authority should verify that the data reported is accurate.

★ If food costs per meal is excessive check for, food waste, the possibility of theft, and over production.



Labor Costs per Meal



Labor Costs per Meal is calculated by dividing the Total Labor Expenditures by the Annual Meal Equivalents Served.

NOTE: The school food authority should verify that the data reported is **accurate**.

★ If Labor Costs per Meal is **excessive**, labor cost should be reviewed.

Meals per Labor Hour (MPLH)

The Meals per Labor Hour equals the average number of meals served per labor hour in a school system.

MPLH is calculated by dividing the Annual Meal Equivalents Served by Total Meal Service Labor Hours.

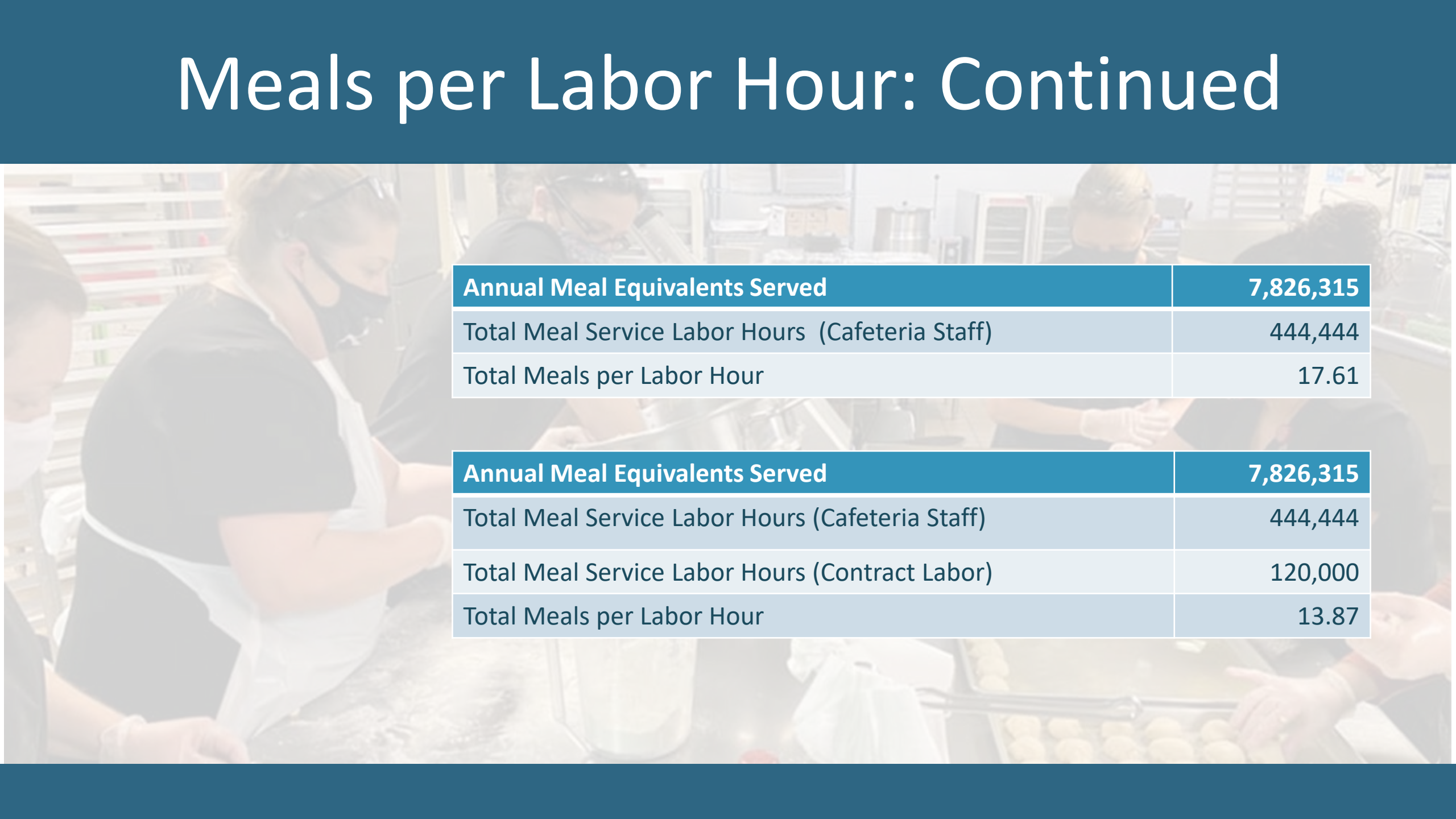
The **Total Meal Service Labor Hours** are obtained from pass-thru worksheet (Total Cafeteria Staff Labor Hours). Contract labor hours must be included in the reported Total Cafeteria Staff Labor Hours.

NOTE: The school food authority should verify that the data reported are accurate.



If the number of meals per labor hour is below 16 or greater than 19, verify the **Total Cafeteria Staff Labor Hours** was reported correctly.

Meals per Labor Hour: Continued

The background of the slide features a faded photograph of several cafeteria staff members working in a kitchen. They are wearing black shirts, white aprons, and face masks. One staff member in the foreground is focused on a task, while others are visible in the background, some wearing gloves. The kitchen environment includes various equipment and shelving.

Annual Meal Equivalents Served	7,826,315
Total Meal Service Labor Hours (Cafeteria Staff)	444,444
Total Meals per Labor Hour	17.61

Annual Meal Equivalents Served	7,826,315
Total Meal Service Labor Hours (Cafeteria Staff)	444,444
Total Meal Service Labor Hours (Contract Labor)	120,000
Total Meals per Labor Hour	13.87

Miscellaneous

The **Miscellaneous** section includes:

- Total Lunches Served
- % Free/Reduced Meals
- Number of Free/Reduced Applications
- Free/Reduced Eligibles %



Total Lunches Served

The **Total Lunches Served** is obtained from the claims for reimbursement.

The **school food authority** should verify the total reported for accuracy and determine if there are trends (upward or downward) or consistent in participation.

The **comparisons** should assist in planning:

- If participation levels are continuously declining, a plan must be implemented to increase participation and decrease expenditures.

% Free/Reduced Meals

The **% Free/Reduced Meals** is calculated from information obtained from the claims for reimbursement. The calculation consists of the **Total Free/Reduced Lunches Served Lunches Served divided by the Total Lunches served to students.**

The **school food authority** should verify the total reported for accuracy and determine if there are trends (upward or downward) or consistency in participation.

The **comparisons** should assist in planning:

- If participation levels are continuously declining, a plan must be implemented to increase participation and decrease expenditures.

Number of Free/Reduced Applications

The **Number** of Free/Reduced Applications is obtained from the claim for reimbursement.

The **school food authority** should verify the total reported for accuracy and determine if there are trends (upward or downward) or consistency in applications.

The **comparisons** should assist in planning.

- ★ If the number of free and reduced applications is declining, a plan must be implemented to increase participation and decrease expenditures.



Free/Reduced Eligibles %



The **Free/Reduced Eligibles %** is obtained from information on the claims for reimbursement.

The percentage is calculated by dividing the **Total Number of Free/Reduced Eligible Students** into the **Total Enrollment**.

The **school food authority** should verify the total reported for accuracy and determine if there are trends (upward or downward) or consistent with enrollment.

The **comparisons** should assist in planning.

- If the Number of Free/Reduced Applications are continuously declining, a plan must be implemented to increase participation and decrease expenditures.

Preliminary CNP Financial Profile



School systems receive a preliminary CNP Financial Profile usually at the spring directors' conference.

- You will be informed, if your school system's financial data reported to the Alabama State Department of Education CNP section and/or Local Education Agency (LEA) were not final for the preliminary financial profile.
- CNP Directors are encouraged to review the report with the school's Chief School Financial Officer to ensure the data reported matches the school system's actual information.

Review Forms



Loria Hunter, Education Specialist II
ALSDE CNP School Programs
2023 New Directors' Training



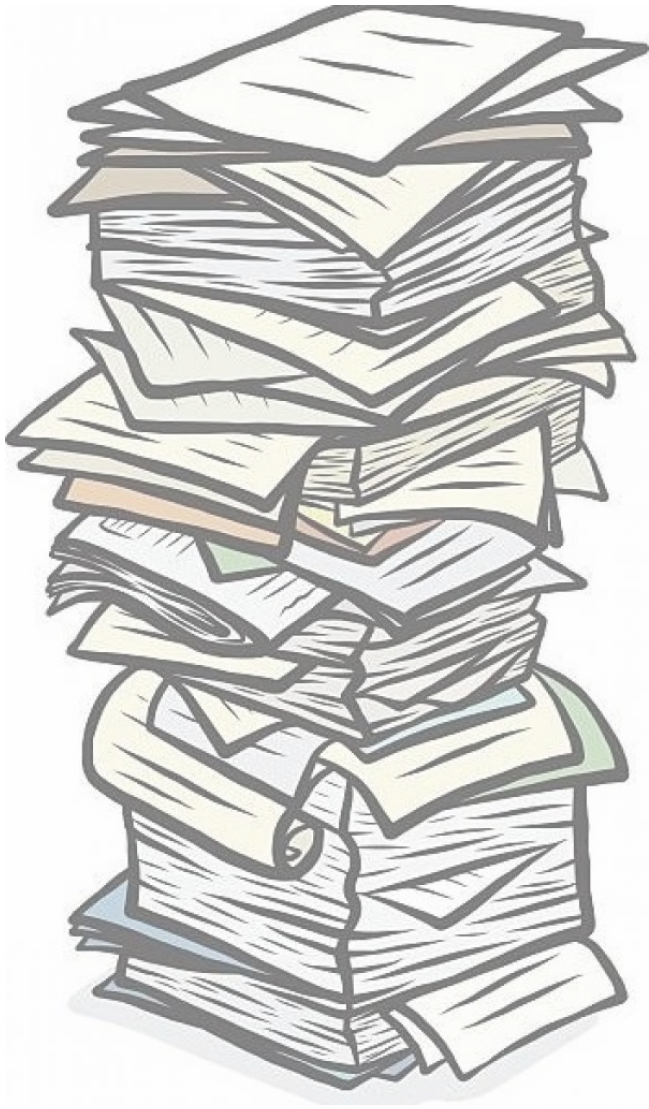
7CFR 210.8(a)(1)

Every school year, each school food authority **with more than one school** shall perform no less than one on-site review of the counting and claiming system and the readily observable general areas of review cited under [§ 210.18\(h\)](#), as prescribed by FNS for each school under its jurisdiction.

General Areas of Review



- Free and reduced-price process
- Meal Pattern
- Civil Rights
- Competitive foods
- Observation of Meal Service
- Food Safety
- Reporting and recordkeeping



7CFR 210.8(a)(1)

The on-site review shall take place
prior to February 1 of each school year.

Further, if the review discloses problems with a school's meal counting or claiming procedures or general review areas, the school food authority shall: ensure that the school implements corrective action; and, within 45 days of the review, conducts a follow-up on-site review to determine that the corrective action resolved the problems.



7CFR 210.8(a)(1)

Each on-site review shall ensure that the school's claim is based on the counting system authorized by the State agency under § 210.7(c) of this part and that the counting system, as implemented, yields the actual number of reimbursable free, reduced price and paid meals, respectively, served for each day of operation.

On Site School Review Form

Programs Observed

- NSLP (National School Lunch Program) and/or
- SBP (School Breakfast Program)



Alabama Department of Education
Child Nutrition Program
NATIONAL SCHOOL BREAKFAST AND LUNCH PROGRAMS
On-Site School Review for LEAs

According to 7CFR 210.8(a)(1), every school year, prior to February 1, each School Food Authority (SFA) with more than one school (as defined 7 CFR Part 210.2 to include Residential Child Care Institutions (RCCIs)) must perform no less than one on-site review of the lunch counting and claiming system employed by each school under its jurisdiction.

Each on-site review must ensure the school's claim is based on the counting system, as implemented, and yields the actual number or reimbursable free, reduced price and paid lunches, respectively, served for each day of operation.

If the review discloses problems with a school's meal counting or claiming procedures, the SFA must ensure that the school implements corrective action and within 45 days of the review conduct a follow-up on-site review to determine that the corrective action resolved the problems.

The Alabama Department of Education Child Nutrition Program State Agency encourages schools to begin reviews in a timely manner in order to meet the required deadline of February 1st. The goal is to review SBP and NSLP in the same day .

Program(s) Observed: ☐ NSLP ☐ SBP

SFA Name _____ Agreement Number _____

School Name _____ School Enrollment _____ Date of Review _____

ADA NSLP: _____ ADA SBP: _____

NSLP Participation %: _____ SBP Participation %: _____
(NOTE: NSLP% and SBP% is the average of the last 3 months percent participation)

	Yes	No	N/A
I. Application Approval			
1. Are applications approved at the central office of Child Nutrition?	☐	☐	☐
Name of approving official: _____			
2. Are all applications on file correctly approved or denied?	☐	☐	☐
II. Direct Certification			
1. Does the school correctly utilize direct certification?	☐	☐	☐
If YES, is required documentation maintained at district level?	☐	☐	☐
III. Master Roster			
1. Is a Point of Sale (POS) roster used in the meal count system?	☐	☐	☐
2. Do names listed on the master roster match approved applications on file and on the direct certification list?	☐	☐	☐
3. If more than one roster is used (i.e. master roster/ticket issuance roster/ food service line roster/ paper rosters), are all rosters the same format?	☐	☐	☐
4. Is a current eligibility list kept up-to-date and used by the meal count system to provide an accurate daily count of reimbursable meals by category (free, reduced price, paid)?	☐	☐	☐
5. Does the POS roster reconcile with the school's student enrollment roster and reflect eligibility?	☐	☐	☐

On-Site School Review Form for LEAs
August 2016

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On Site School Review Form



Alabama Department of Education Child Nutrition Program



NATIONAL SCHOOL BREAKFAST AND LUNCH PROGRAMS On-Site School Review for LEAs

According to 7CFR 210.8(a)(1), every school year, **prior to February 1**, each School Food Authority (SFA) with more than one school (as defined 7 CFR Part 210.2 to include Residential Child Care Institutions (RCCIs)) must perform no less than one on-site review of the lunch counting and claiming system employed by each school under its jurisdiction.

Each on-site review must ensure the school's claim is based on the counting system, as implemented, and yields the actual number or reimbursable free, reduced price and paid lunches, respectively, served for each day of operation.

If the review discloses problems with a school's meal counting or claiming procedures, the SFA must ensure that the school implements corrective action and within 45 days of the review conduct a follow-up on-site review to determine that the corrective action resolved the problems.

The Alabama Department of Education Child Nutrition Program State Agency encourages schools to begin reviews in a timely manner in order to meet the required deadline of February 1st. The goal is to review SBP and NSLP in the same day .

Program(s) Observed: ☐ NSLP ☐ SBP

SFA Name

Agreement Number

School Name

School Enrollment

Date of Review

ADA NSLP: _____

ADA SBP: _____

NSLP Participation %: _____

SBP Participation %: _____

(NOTE: NSLP% and SBP% is the average of the last 3 months percent participation)



On Site Review Form - Average Daily Attendance (ADA)

Calculate the average daily attendance:

The total number of students in attendance for 3 months prior to the review

The total number of operating days 3 months prior to the review



On Site School Review Form

NSLP Participation %
SBP Participation %

Note: NSLP% and SBP% is the average of the last 3 months percent participation

Calculate the average daily participation:

Lunch Average Daily Participation =

$$\frac{\text{Number of lunches served in 3 months}}{\text{Number of operating days in 3 months}}$$

Breakfast Average Daily Participation =

$$\frac{\text{Number of breakfasts served in 3 months}}{\text{Number of operating days in 3 months}}$$

Calculate the average daily participation rates:

Lunch Participation Rate =

$$\frac{\text{Lunch ADP}}{\text{Average Daily Attendance}} \times 100$$

Breakfast Participation Rate =

$$\frac{\text{Breakfast ADP}}{\text{Average Daily Attendance}} \times 100$$



On Site Review Form

- Application Approval – Correct eligibility determination
- Direct Certification – DC students correct in POS based on PowerSchool DC list and/or DC list on the online application site
- Master Roster – shows correct benefit issuance according to correct meal eligibility

	Yes	No	N/A
I. Application Approval			
1. Are applications approved at the central office of Child Nutrition?	☐	☐	☐
Name of approving official: _____			
2. Are all applications on file correctly approved or denied?	☐	☐	☐
II. Direct Certification			
1. Does the school correctly utilize direct certification?	☐	☐	☐
If YES, is required documentation maintained at district level?	☐	☐	☐
III. Master Roster			
1. Is a Point of Sale (POS) roster used in the meal count system?	☐	☐	☐
2. Do names listed on the master roster match approved applications on file and on the direct certification list?	☐	☐	☐
3. If more than one roster is used (i.e. master roster/ticket issuance roster/ food service line roster/ paper rosters), are all rosters the same format?	☐	☐	☐
4. Is a current eligibility list kept up-to-date and used by the meal count system to provide an accurate daily count of reimbursable meals by category (free, reduced price, paid)?	☐	☐	☐
5. Does the POS roster reconcile with the school's student enrollment roster and reflect eligibility?	☐	☐	☐

On Site Review Form

- Accurate counts
- Following approved meal count procedures
- POS counting
- Reimbursable meals/non reimbursable meals
- Prevent overt identification of F/R students
- Back up system/procedures in place
- Meals claimed by category > F/R/P approvals
- Meals claimed > the attendance adjusted eligible by category

	Yes	No	N/A
IV. Meal Count System (as determined by observation of the meal service).			
1. Does the meal count system produce an accurate count of reimbursable meals by category (i.e. free, reduced price, paid) served to eligible children?	☐	☐	☐
2. Are the approved meal count procedures implemented?	☐	☐	☐
(a) Are meal counts taken at the point of meal service?	☐	☐	☐
(b) Are only meals that meet meal pattern requirements counted and claimed for reimbursement?	☐	☐	☐
(c) Does the meal count procedure in use ensure that only one meal per child per meal service is claimed for reimbursement?	☐	☐	☐
3. Does the meal count system prevent overt identification of children receiving free or reduced price meals?	☐	☐	☐
4. Is the person responsible for monitoring meals correctly identifying reimbursable meals?	☐	☐	☐
5. Is someone trained as a backup for the monitor and the meal counter (i.e., substitute cashier)?	☐	☐	☐
6. Are there procedures for meal counting and claiming when the primary counting and claiming system is not available and do staff know when and how to implement it?	☐	☐	☐
7. Is the school correctly implementing policies for handling the following (as applicable):			
(a) Incomplete Meals?	☐	☐	☐
(b) Second Meals?	☐	☐	☐
(c) Charged and/or prepaid meals?	☐	☐	☐
(d) Offer vs Serve?	☐	☐	☐
(e) Adult and non-student meals?	☐	☐	☐
(f) A la Carte?	☐	☐	☐
(g) Student worker meals?	☐	☐	☐
(h) Field Trips?	☐	☐	☐
(i) Lost, stolen, misused, forgotten or destroyed tickets, tokens, IDs, PINs?	☐	☐	☐
(j) Visiting student meals?	☐	☐	☐
8. Is there a method of identifying non-reimbursable meals (i.e. not meeting meal pattern requirements, seconds, adult meals, etc.), distinguishing them from reimbursable meals?	☐	☐	☐
V. Meal Counting, Recording, and Edit Checks			
1. For any day during the review month, does the number of lunches claimed by category (i.e. free, reduced-price, and paid) exceed the number of approved free, reduced-price, and paid eligible?	☐	☐	☐
If YES to number 1, is there an acceptable reason why the number exceeded?	☐	☐	☐
Was documentation maintained?	☐	☐	☐
2. For any day during the review month, does the number of lunches claimed exceed the attendance adjusted eligible by category (i.e. free, reduced-price, and paid)?	☐	☐	☐
If YES to number 2 is there an acceptable reason why the number exceeded?	☐	☐	☐
Was documentation maintained?	☐	☐	☐

On Site Review Form

	Yes	No	N/A
3. Are internal controls (edits, monitoring, etc.) established to ensure that daily counts do not exceed the number of students eligible or in attendance and that an accurate claim for reimbursement is made?	☐	☐	☐
4. Is the cash reconciliation verified and signed by another staff member? (Two people must sign documenting cash received.)	☐	☐	☐
5. Is the end of the day computer generated report or a copy reconciliation sheet attached to this review?	☐	☐	☐

Record today's meal counts by category and compare to the number of students eligible by category.

Total Number of Students Approved by Category

Today's Total Meal Counts by Category

Free: _____ Free: _____

Reduced Price: _____ Reduced Price: _____

Paid: _____ Paid: _____

VI. Reimbursable Meals and Production Records, Signage

1. Does the school follow the menu plan as approved and published?	☐	☐	☐
2. Does the menu as planned meet all of the meal requirements for a reimbursable meal?	☐	☐	☐
3. Are all food items and condiments listed on the production record?	☐	☐	☐
4. Do all production records include:			
(a) serving size?	☐	☐	☐
(b) amounts planned?	☐	☐	☐
(c) amounts prepared?	☐	☐	☐
(d) amounts used?	☐	☐	☐
(e) leftovers (if any)?	☐	☐	☐
(f) how leftovers were handled or dispersed?	☐	☐	☐
5. Are production records accurate?	☐	☐	☐
6. Do production records document sufficient amounts of prepared food to meet the requirements for reimbursable meals for the number of meals claimed?	☐	☐	☐
7. Does the school have proper signage displayed? (menus, required OVS signage, etc.)	☐	☐	☐

VII. Civil Rights

1. Based on observation, was meal service provided without separation by age, race, color, national origin, sex or disability in the eating area, serving line, and assignment of eating periods?	☐	☐	☐
2. Is the 'and Justice for All' poster prominently displayed in the dining/serving area?	☐	☐	☐

VIII. Competitive Foods/Wellness Policy

1. Are only allowable foods sold during the meal service in the food service area?	☐	☐	☐
2. Are vending machines available for students outside the cafeteria? If yes, where?	☐	☐	☐
3. Is school in compliance with the State Board of Education's policy on competitive foods?	☐	☐	☐
4. Is the exempt fundraising form signed by the principal and on file?	☐	☐	☐

- Following menu
- Meal requirements met
- Food and condiments listed on production record
- Production record complete and accurate
- Signage displayed (menus, OVS, CR)
- Competitive Foods/Wellness Policy

Meal Service Observation

- Serving line set up
- TCS
- Overall appearance of cafeteria and serving line
- Menu items last throughout meal service
- Batch cooking
- Use of standardized recipes
- Correct serving utensils
- OVS

HACCP/Equipment

- Storage areas clean and organized
- Temperature log
- Food/supplies 6" off floor
- Health inspection reports
- Pest/rodent free

	Yes	No	N/A
IX. Observation of Meal Service			
1. Is serving line set up properly?	☐	☐	☐
2. Is the food aesthetically appealing?	☐	☐	☐
3. Are serving lines clean and well maintained throughout meal service?	☐	☐	☐
4. Are hot foods served hot and cold foods served cold?	☐	☐	☐
5. Is the overall appearance of the cafeteria clean and inviting; and does it encourage participation?	☐	☐	☐
6. Are students offered all menu items from first to last student served?	☐	☐	☐
7. Are food items batch cooked?	☐	☐	☐
8. Are standardized recipes being followed?	☐	☐	☐
9. Are correct serving utensils used to ensure required portion sizes for each age group?	☐	☐	☐
10. If OVS, are students allowed to decline items?	☐	☐	☐
X. HACCP/Equipment			
1. Is HACCP manual available and being followed by staff?	☐	☐	☐
2. Is dry storage area clean and organized?	☐	☐	☐
3. Is dry storage temperature log maintained and indicative of proper temperatures? Record today's dry storage temperature: _____	☐	☐	☐
4. Does inventory indicate FIFO method is being used?	☐	☐	☐
5. Are coolers clean and organized?	☐	☐	☐
6. Are cooler temperature logs maintained and indicative of proper temperatures? Record today's cooler temperature(s): _____	☐	☐	☐
7. Is freezer clean and organized?	☐	☐	☐
8. Is freezer temperature log maintained and indicative of proper temperatures? Record today's freezer temperature: _____	☐	☐	☐
9. Is food in all storage areas being stored at least 6 inches from the floor?	☐	☐	☐
10. Have there been 2 health inspections within the last 12 months? Record scores of 2 most recent inspections: _____	☐	☐	☐
11. Do food service areas, storage areas and kitchen area appear to be pest free?	☐	☐	☐
12. Is all equipment in good working order?	☐	☐	☐
13. Is equipment being used and cleaned properly?	☐	☐	☐
14. Is Equipment Replacement Plan developed and on file for this site?	☐	☐	☐
Comments/Concerns Based on Observation:			
_____ Manager's Signature		_____ Principal's Signature	
_____ Director's Signature		_____ Date	

On Site Review Form - Results of Review and Corrective Action

- Identify issues and actions needed to bring in compliance
- Follow up within 45 days

	Yes	No	N/A
VII. Results of Review			
1. Is a corrective action plan required?	☐	☐	☐
2. Is a follow-up review required?	☐	☐	☐
VIII. Comments, Notes, and Observations During the Review			
IX. Required Corrective Action (follow up within 45 days)			
Specify date by which corrective action(s) will be implemented: _____			
_____ Signature of Reviewer		_____ Date	
_____ Signature of Manager		_____ Date	
X. Follow Up Visit (must be conducted within 45 days if corrective action was required):			
Observation of corrective action implementation:			
_____ Signature of Reviewer		_____ Date	
_____ Signature of Manager		_____ Date	
_____ Signature of Principal		_____ Date	
Keep with your program documents. Do not send to the state agency.			
If you have more than one site, please remember on-site reviews must be completed annually by February 1st.			

On-Site School Review Form for LEAs
August 2016

Afterschool Snack Program Review Form

- 1st Review/2nd Review
- Area Eligible School – 50% or more F/R eligible
- Non-Area Eligible – claim based on free, reduced price, paid
- Meal Counts
- Attendance Records
- Production Records
- Meal Pattern Compliance
- Onsite observation – one snack per child per day and education/enrichment activities



Alabama Department of Education
Child Nutrition Program
AFTER SCHOOL SNACK PROGRAM
On-Site School Review for LEAs

Site Name: _____ Date: _____

Reviewer's Name: _____

This review form must be completed twice per school year for each after school snack program site.
The first review must be conducted within the first 4 weeks of program initiation.

☐ First Review ☐ Second Review

Area Eligible School Based on your observation, is valid documentation maintained for the following records?			Non-Area Eligible School Based on your observation, is valid documentation maintained for the following records?		
	YES	NO		YES	NO
1. Area Eligibility Data (based on most recent October)			1. Free and Reduced Priced Eligibility of Children		
2. Meal Counts (total by site)			2. Meal Counts (by category – free, reduced, paid)		
3. Attendance Records			3. Attendance Records		
4. Production Records			4. Production Records		
5. Meal Pattern Compliance			5. Meal Pattern Compliance		
6. Is reimbursement claimed for only one snack per student per day?			6. Is reimbursement claimed for only one snack per student per day?		
7. Does the meal count for the Day of Review follow the pattern for the previous 10 days?			7. Does the meal count for the Day of Review follow the pattern for the previous 10 days?		
8. Are educational and/or enrichment activities taking place?			8. Are educational and/or enrichment activities taking place?		

For pricing program only, list the established price for paid and reduced snacks.
PAID: _____ REDUCED: _____

For any "NO" answer above, please describe the corrective action taken to resolve the non-compliance concern.

Manager's Signature _____
Director's Signature _____
Principal's Signature _____
Date _____

August 2016

Reminders

- NSLP Equipment Assistance Grant
- New Directors Meeting – Oct 24-26
- Verification Reminder – Oct 1st
Verification Info sent - September 11th



Questions

- cnpslp@alsde.edu
- Email: loria.hunter@alsde.edu

Subject Line: New Director
September Webinar Question

Remember: Questions and
answers will be compiled and
shared via email.



USDA Non-Discrimination Statement

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation*), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotope, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: [USDA Program Discrimination Complaint Form](#) from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

This institution is an equal opportunity provider.

*This language was added pursuant to the May 5, 2022, USDA memorandum. However, the inclusion and applicability of this language is currently under challenge in the matter of *The State of Tennessee, et al. v. USDA, et al.*, Case No. 3:22-cv-00257, and may be subject to change.