School Programs Annual Checklist

MONTHLY

All Sponsors:

- Submit reimbursement claim (by the 20th)
- Conduct monthly manager meeting
- Drop-in site visits to kitchens
- Make revisions to annual agreement as needed
- Run SWP Mapping Files
- Track food costs and non-domestic purchases
- Publish next month's menu to kitchens and online

Pricing Sponsors

- Run Direct Certification (DC) + verify in POS/PowerSchool
- Check unmatched DC students (AIM)
- Process F/R applications + send notifications

JULY

BEGINNING OF PROGRAM YEAR

- Coordinate point of sale (POS) vendor Start of Year (SOY) procedures with the district's enrollment procedures. Work with the IT coordinator to determine rollover process.
- After the DC file is successfully implemented at ALSDE (early July), run the DC list in PowerSchool and the POS. Compare lists to ensure DC eligibles are accurate in both.
- Send your Public Media Release to major employers and news media. Use ALSDE template.
- Review HACCP manual and update as needed. Make sure all logs are available at kitchens.
- Review CNP Procurement Plan and local purchasing guidelines. Update as needed.
- Update nutrition information with new or reformulated product specifications (if not using LINQ).
- Prepare menus for the upcoming school year.
- Finalize preparations for back to school training for CNP staff.
- Follow guidelines for equipment transfers or disposal as needed.
- Gain access to updated order guides through LINQ, print for kitchens as needed.
- Manage equipment deliveries and installations.
- Open up online payment system for parents, advertise procedures during registration.
- Post August menus online and share with local schools.
- Update pricing information in databases and at local kitchens for any newly awarded bids.
- Renew contracts for vended meals, including HeadStart. Use prior fiscal year's plate cost calculation to determine vended meal pricing.
- Pricing Sponsors
  - Activate online F/R meal application
  - Prepare hard copy F/R meal applications, How to Apply, and FAQ
  - Communicate application procedures with head registrar
  - Share board approved Charged Meal Policy with local schools and kitchens

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AUGUST

- Conduct and document professional development for CNP employees.
- Ensure all site Food Permits are active. Contact the health department if expired.
- Schedule On-Site Reviews for all kitchens. Reviews must be completed before February 1.
- Review all student Diet Prescriptions. Meet with school nurse and kitchen managers to ensure all student needs are met.
- Conduct On-Site Reviews for snack programs within the first four weeks of operation.
- Conduct first week of school site visits at all kitchen locations to assess logistical operations.
- Conduct school breakfast outreach (i.e., social media, district website, flyers, etc.)
- Look for the Pass Thru Workbook via Docusign. Coordinate with your CSFO for assistance in completing the required information.
- Plan for fall activities (i.e., NSLW, World Milk Day, Apple Crunch Day, Holiday Meals)

SEPTEMBER

END OF FISCAL YEAR

- Submit reimbursement claim by the 5th of this month to receive payment in September. Claims are not late until the 20th but due to the fiscal year end, anything submitted after the 5th will not be paid until October.
- Run the direct certification (DC) list in PowerSchool and your point of sale (POS). Compare lists to ensure DC eligibles are accurate in both systems. Work with enrollment office if there are any discrepancies. Ensure your local federal programs contact is updating categorically eligible students in PowerSchool.
- Purchase food and promotional items aligned with National School Lunch Week theme.
- Plan holiday meal logistics and menus with input from managers and school administration.
- Determine your program’s expectations for end of fiscal year expectations with local accounting.
- Conduct end of fiscal year inventory (0141 Materials and Supplies, 0143 Food)
- Finish the Pass Thru Workbook. Ensure it is signed and submitted to ALSDE.
- Pricing Sponsors:
    - Inform households of 30-operating day carryover expiration.
    - Ensure that termination of benefits occurred in the POS and Paid status was communicated to PowerSchool if households did not submit a new F/R application during the 30-day carryover.

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OCTOBER

- Celebrate National School Lunch Week. Share photos at #BreakforaPlateAlabama.
- Verification process begins October 1. Watch the webinar released by ALSDE.
- Complete Verification process as prompted by POS system and state agency platforms. Requirements vary according to pricing/non-pricing designation.
- 20-day Enrollment Count: This is an official report pulled by ALSDE Student Services on the 3rd Friday in October. Collaborate with IT coordinator to ensure accuracy of all student F/R/DC data.
- Work with your local accounting to complete the Annual CNP Financial Report.
- Make plans to attend the ALSDE Fall Conference. Coordinate with board approved travel policy for your school district.

NOVEMBER

- Send Exempt Fundraising Form to school principals for second semester updates.
- Contact health department if kitchens have not been reviewed yet this year. Kitchens are required to be reviewed twice each year, typcially once each semester.
- Review Standard Operating Procedures (SOPs) for field trips and unexpected school closures with kitchen managers and school administration.
- Complete the Annual CNP Financial Report. Due no later than January 1.
- Check your progress with On-Site Kitchen Reviews. Due no later than February 1.
- Make plans for any staff professional development time in January.
- Review training hours received by current staff and provide additional training for those who need hours. Annually, directors need 12 hrs., managers need 10 hrs., and staff need 6 hrs. Keep track of all staff training hours and USDA training codes.
- Pricing Sponsors:
  - Complete Verification no later than November 15th.

DECEMBER

- Communicate end of semester cleaning tasks for kitchens.
- Ensure FFAVORS purchases have been made to avoid the mid-year account sweep.
- Conduct an informal equipment review at each school. Check for maintenance needs, problematic pieces, and potential replacements.
- Follow up with principals to submit additions to Exempt Fundraiser Form. Due January 1.
- Collect a copy of all first semester health inspection forms.
- Conduct a quarterly budget analysis. Make any amendments as necessary.
  - Consult the Financial Management Handbook for details regarding appropriate calculations and meal equivalents.

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JANUARY

- After new enrollment settles, run the direct certification (DC) list in PowerSchool and the point of sale (POS). Compare lists to ensure DC eligibles are accurate in both.
- Collect remaining Exempt Fundraiser Reports from school administrators.
- Review your Wellness Policy to determine if/when the Wellness Committee should meet and when the next Triennial Assessment of the policy is due.
- Finish all School On-Site Reviews. Ensure all forms are filled out completely, signed by all required parties, and have all required corrective action complete within the 45-day time frame. Maintain documentation locally.
- Work with managers to evaluate current inventory.
- Review USDA and FFAVORS accounts for upcoming arrivals or purchases.
- Make adjustments to menus to reduce inventory through the end of the school year.
- Begin summer meal service planning, if applicable. Watch for summer training announcements.
- Make plans to participate in National School Breakfast Week (NSBW).
- Make plans to participate in Alabama's Legislative Action Day through the Alabama School Nutrition Association (ASNA)

FEBRUARY

- On-Site School Reviews should be completed by February 1. Keep all reviews and associated documentation on file locally.
- Poll CNP staff regarding retirements, desired transfers and potential separations for the upcoming school year, according to your local board policy.
- Make a prioritized list of large and small equipment needs. Work with local equipment vendors to develop appropriate specifications for procurement.
- Schedule a meeting with your CSFO/Accounting Team to begin budget planning for the upcoming school year.
- Be on the lookout for a USDA foods survey that will be emailed from the Food Distribution section, entitled "Let's Go Shopping". Complete next year's USDA order preferences and return by the provided deadline.
- Collaborate with your kitchens and IT coordinator to evaluate hardware and software needs/upgrades: manager's offices, Point of Sale devices, touch screen monitors, scanners, etc.
- Conduct second review of any ongoing snack program. Keep reviews on file locally.
- Make plans to attend the ALSDE/ASNA joint Spring Conference.
- Continue preparations for National School Breakfast Week celebrations.

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MARCH

- Celebrate National School Breakfast Week (2nd week in March).
- Attend summer meal service training if serving meals to students this summer.
- Develop menus, grocery orders, and timelines for summer feeding. Coordinate with district instructional staff.
- Discuss CNP staff employee evaluation expectations with kitchen managers.
- Be aware of your FFAVORS fund balance. All funds in this account must be spent by June 30 each year.
- Attend Spring ASNA/ALSDE conference.
- Make plans to attend the summer School Nutrition Association Annual National Conference (ANC), if possible.
- Ensure any corrective action cited in on-site reviews has been completed within the 45-day timeframe.
- Make plans to celebrate School Lunch Hero Day, 1st Friday in May
- Review Standard Operating Procedures (SOPs) for field trips with kitchen managers and school administration.

APRIL

- Identified Student Percentage (ISP) data is collected on April 1st and published on April 15th annually. No action is required, but be aware of your school/district's published data.
- Schedule meeting with your superintendent, Federal Programs Coordinator, and CSFO to discuss participation in CEP, if applicable. Ensure that all parties are aware of current DC student data and the district's progression in CEP cycle.
- Conduct kitchen manager evaluations.
- Continue plans to participate in School Lunch Hero Day. Include local school administrators in plans for the celebration of your CNP staff.
- Work with ALSDE SUN Program staff to complete your application for summer mealservice.
- Begin document management: Properly secure and file selected documents. Prepare outdated documents for shredding per district guidance. ALSDE requires 3 years plus current, but your local policy might require additional years.
- Contact POS software company to request End of Year (EOY) instructions or service.
- Contact snack program administrators at your local schools to determine last day of service.
- Ensure that the second review of the snack program has been conducted.

School Programs Annual Checklist

APRIL, Continued

- If a second health inspection has not been conducted at all kitchen sites, contact the local health department. Keep documentation of your request for a second inspection on file.
- Review kitchen inventory with managers. Discuss menu alterations necessary to make wise use of inventory. Carefully review all new grocery orders to ensure inventory stays as low as possible over the summer months.
- Discuss meal debt collection procedures with CSFO and school administrators, if applicable.
- Determine procedures for end of year balance refunds, especially for senior account balances.
- Begin gathering data for the completion of next school year's annual agreement.

MAY

- Celebrate School Lunch Hero Day (optional) – 1st Friday in May.
- Email principals the negative meal balance report. Establish a "payment due" date.
- Send detailed expectations to kitchen managers regarding closing out kitchens at the end of the school year.
- Schedule suspension of online meal applications, payment service, and online menus.
- Review online annual agreement and contact principals for upcoming school year information (meal service times, beginning/ending of school day/adding snack or breakfast in the classroom, etc.).
- Complete Paid Lunch Equity (PLE) workbook, if applicable.
- Complete Non-Program Revenue Tool calculation. Take corrective actions, if necessary.
- Review/update a la carte pricing, including adult meals.
- Submit price changes to the board for approval, if applicable.
- Post staff vacancies for upcoming school year.
- Schedule and conduct interviews. Submit recommendations to the board for approval.
- Schedule annual foodservice equipment summer maintenance and services (hood and grease trap cleaning, fire suppression system, general maintenance, etc.)
- Begin working on menus for upcoming school year. Provide managers with the first two weeks of menus before the end of the month.
- Review and update procurement processes. Check for updates to threshold amounts.
- Draft and submit bid documents for purchased food services and equipment.
- Draft plans for back-to-school staff training. Check with your administration for district-wide training. Contact neighboring districts for potential training collaborations.
- Complete all details and required documentation for the annual agreement. Submit to ALSDE for approval.

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JUNE

- Submit Exempt Fundraiser Attestation form to superintendent and school principals. Due back to you no later than July 1st.
- Make any required revisions to the online agreement. Ensure final approval is received, including CEP Schedule approval, if applicable.
- Review and approve grocery orders for all school sites for the 1st two weeks of school.
- Conduct site visits for SFSP/SSO.
- If using a customized production record, review and update as needed. Changes must be approved by ALSDE.
- Wellness Policy Triennial Assessment due by June 30, if applicable.
- Meet with wellness committee to review wellness plan. Update as needed. If updated, post wellness plan, score card, and assessment on the district's website.
- Submit upcoming school year information to be included in the district policy manual/handbook (i.e., meal prices, charging policies, a la carte availability, bad debt, uniforms, etc.).
- Submit record of health inspections to ALSDE through the LINQ CNIPS site.
- Submit documentation to ALSDE if any new schools are opening, closing, or if school enrollment is being reconfigured.
- Update and refresh any information on the CNP portion of your school website, including mission statements, Civil Rights language, staffing updates, outreach efforts, polcies, menu locations, etc.

If you are a pricing school district:

- Confirm that online F/R meal application, payment, and menu services are disabled.
- Finalize F/R application updates. Submit hardcopy for printing and test the online application.
- Review F/R meal notification letters and update as needed.
- Update F/R meal application materials (hardcopy and electronic) for the upcoming school year.