



**NATIONAL FOOD SERVICE  
MANAGEMENT INSTITUTE**

*The University of Mississippi*

**COMPETENCIES, KNOWLEDGE, AND SKILLS  
FOR DISTRICT-LEVEL SCHOOL NUTRITION  
PROFESSIONALS IN THE 21ST CENTURY**

**FACILITIES AND EQUIPMENT MANAGEMENT**

*Financial Management*

**FOOD PRODUCTION AND OPERATION MANAGEMENT**

**FOOD SECURITY, SANITATION, AND SAFETY**

*Human Resource Management*

**MARKETING AND COMMUNICATION**

**MENU AND NUTRITION MANAGEMENT**

**PROCUREMENT AND INVENTORY MANAGEMENT**

**PROGRAM MANAGEMENT AND ACCOUNTABILITY**

*Technology and Information Systems*

**APPLIED RESEARCH DIVISION**  
*The University of Southern Mississippi*

# Competencies, Knowledge, and Skills for District-Level School Nutrition Professionals in the 21st Century



**National Food Service Management Institute**  
The University of Mississippi

This publication has been produced by the National Food Service Management Institute – Applied Research Division, located at The University of Southern Mississippi with headquarters at The University of Mississippi. Funding for the Institute has been provided with federal funds from the U.S. Department of Agriculture, Food and Nutrition Service, to The University of Mississippi. The contents of this publication do not necessarily reflect the views or policies of The University of Mississippi or the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government.

The information provided in this publication is the result of independent research produced by NFSMI and is not necessarily in accordance with U.S. Department of Agriculture Food and Nutrition Service (FNS) policy. FNS is the federal agency responsible for all federal domestic child nutrition programs including the National School Lunch Program, the Child and Adult Care Food Program, and the Summer Food Service Program. Individuals are encouraged to contact their local child nutrition program sponsor and/or their Child Nutrition State Agency should there appear to be a conflict with the information contained herein, and any state or federal policy that governs the associated Child Nutrition Program. For more information on the federal Child Nutrition Programs please visit [www.fns.usda.gov/cnd](http://www.fns.usda.gov/cnd).

# **National Food Service Management Institute The University of Mississippi**

## **Building the Future Through Child Nutrition**

The National Food Service Management Institute was authorized by Congress in 1989 and established in 1990 at The University of Mississippi in Oxford. The Institute operates under a grant agreement with the United States Department of Agriculture, Food and Nutrition Service.

### **PURPOSE**

The purpose of NFSMI is to improve the operation of Child Nutrition Programs through research, education and training, and information dissemination. The Administrative Offices and Divisions of Information Services and Education and Training are located in Oxford. The Division of Applied Research is located at The University of Southern Mississippi in Hattiesburg.

### **MISSION**

The mission of the NFSMI is to provide information and services that promote the continuous improvement of Child Nutrition Programs.

### **VISION**

The vision of the NFSMI is to be the leader in providing education, research, and resources to promote excellence in Child Nutrition Programs.

## **Contact Information**

### **Headquarters**

The University of Mississippi  
Phone: 800-321-3054  
Fax: 800-321-3061  
[www.nfsmi.org](http://www.nfsmi.org)

### **Education and Training Division Information Services Division**

The University of Mississippi  
6 Jeanette Phillips Drive  
P.O. Drawer 188  
University, MS 38677-0188

### **Applied Research Division**

The University of Southern Mississippi  
118 College Drive #10077  
Hattiesburg, MS 39406-0001  
Phone: 601-266-5773  
Fax: 888-262-9631

# Acknowledgments

## WRITTEN AND DEVELOPED BY

Mary Frances Nettles, PhD, RD  
*Research Scientist*

Deborah H. Carr, PhD, RD  
*Director*

Amelia Estepa Asperin, PhD  
*Research Scientist*

Applied Research Division  
*The University of Southern Mississippi*

**NFSMI EXECUTIVE DIRECTOR**  
Charlotte B. Oakley, PhD, RD, FADA

---

---

# COMPETENCIES, KNOWLEDGE, AND SKILLS FOR DISTRICT-LEVEL SCHOOL NUTRITION PROFESSIONALS IN THE 21ST CENTURY

---

---

## Introduction

School nutrition (SN) professionals are hired by school districts to oversee district-wide foodservice operations. Their responsibilities include planning, administering, implementing, monitoring, and evaluating all aspects of the SN program to ensure that school meals are nutritious, age-appropriate, appealing, and cost-effective. Depending on the size of the SN operation and the school district, district-level responsibilities may be divided into one or more district-level positions.

The environment in which SN programs operate is more complex and is changing at a faster pace than ever before. SN programs have evolved from small operations into multi-million dollar enterprises being run as businesses within the school setting. As such, the concept of the *Trusted Advisor* was developed by participants at a National Food Service Management Institute, Applied Research Division workshop to capture the vision of the SN director as a professional administrator, savvy business person, skilled content expert, and nutrition expert. Participants described the characteristics of a *Trusted Advisor* as someone who is a:

- strategic planner,
- critical thinker,
- collaborator,
- articulate presenter,
- macro-manager, and
- confident leader.

These characteristics provided the foundation for the identification of the functional areas, competencies, knowledge, and skills needed by district-level SN professionals to be successful *Trusted Advisors* in the 21st century. The following definitions were used to guide the process:

- **SN directors/supervisors** are the professional(s) who oversee all aspects of the district-wide school nutrition program. This could be one or more district-level school nutrition professionals.
- **Functional** areas are the broad groupings or divisions of job responsibilities that are performed by directors/supervisors within the local school nutrition

operation. These categories serve as the umbrella for all job responsibilities that occur on a daily, weekly, seasonal, or yearly basis.

- **Competencies** are the underlying characteristics within each functional area that lead to successful performance. They may include knowledge and skills as well as various levels of motivation.
- **Knowledge** is the information a person has in specific content areas that is necessary for successful performance in a competency area.
- **Skills** are the abilities to perform certain physical, mental, and/or interpersonal tasks that are necessary for successful performance in a competency area.

This project was conducted in two phases and SN professionals participated in both phases of the project. Phase I utilized an expert panel consisting of SN directors and state agency staff to bring about agreement on functional areas encompassing the job responsibilities of SN directors/supervisors and the competency, knowledge, and skill statements needed in each functional area. The Phase II review panel members verified whether the knowledge and skill statements were important to the job responsibilities of a SN director/supervisor and confirmed whether the competency statements were consistent with the supporting knowledge and skill statements. They were also asked to categorize the knowledge and skill statements into the following three categories:

- **Essential** knowledge or skill to administer the SN program,
- **Advanced** knowledge or skill beyond what is essential to administer the SN program, or
- **Just-in-time** knowledge or skill to address a time-sensitive issue/initiative.

Ten functional areas encompassing the job responsibilities of district-level SN professionals were identified:

- Facilities and Equipment Management,
- Financial Management,
- Food Production and Operation Management,
- Food Security, Sanitation, and Safety,
- Human Resource Management,
- Marketing and Communication,
- Menu and Nutrition Management,
- Procurement and Inventory Management,
- Program Management and Accountability, and
- Technology and Information Systems.

## INTRODUCTION *continued*

In addition to these functional areas, 23 competencies, 127 knowledge statements, and 188 skill statements were confirmed by the Phase II review panel. From these statements, the review panel identified only 23 statements as being advanced beyond what is essential to administer the SN program and 1 statement as just-in-time knowledge/skill to address a time-sensitive issue/initiative. The remaining 291 statements were identified as being essential knowledge or skills needed to administer the SN program.

The functional areas, competencies, knowledge, and skills identified in this project provide a clear picture of the role of SN professionals at the district level. Job requirements for SN directors differ from state to state and often from school district to school district. School district administrators can use the knowledge and skill statements and the sample job description template in preparing job descriptions for SN directors. The information can also serve as a framework for district administrators to identify the criteria for evaluating an effective SN director. As *Trusted Advisors*, SN directors can use this information to advance their knowledge and skills while improving their SN programs. The competencies, knowledge, and skills identified in this project can provide the foundation, when needed, to design other district-level SN positions and prepare job descriptions. In addition, SN directors can use this information when identifying staff members who demonstrate the potential to advance within the SN program. Finally, the competencies, knowledge, and skills framework can provide the basis for mentoring and other succession planning activities to prepare SN professionals for district-level responsibilities.

---

---

## **KNOWLEDGE AND SKILL STATEMENTS**

---

---

---

---

**COMPETENCIES, KNOWLEDGE, AND SKILLS FOR  
DISTRICT-LEVEL SCHOOL NUTRITION PROFESSIONALS  
IN THE 21<sup>ST</sup> CENTURY**

---

---

**Functional Area 1: Facilities and  
Equipment Management**

**COMPETENCY 1.1**

Provides leadership in designing and planning facilities that support the operational goals of the school nutrition program.

**ESSENTIAL**

**Knowledge Statements**

- Knows the relationship of the menu to the design of a facility.
- Knows facility design, equipment, and distribution issues related to on-site preparation, central production, and/or warehousing operations.
- Knows design principles that maximize equipment efficiency and facility layout to meet program goals.
- Knows principles of designing facilities for efficient service.

**Skill Statements**

- Utilizes a team approach for planning new construction and/or renovation projects.
- Seeks input from school nutrition staff for design enhancements to improve workflow and service systems.
- Creates a profile describing the school nutrition program to guide the planning team in designing an effective and efficient operation.
- Leads a team-based needs assessment of the school nutrition program to guide new construction and/or renovation projects.

COMPETENCY 1.1 continued

**ADVANCED**

**Knowledge Statements**

- Knows the importance of interpreting architect/consultant blueprints in new construction/renovation projects.

**Skill Statements**

- Evaluates architect/consultant blueprints to determine if designs address the operational needs of the school nutrition program and communicates recommendations, as needed.

**JUST-IN-TIME**

**Knowledge Statements**

- None

**Skill Statements**

- None

**COMPETENCY 1.2**

**Develops guidelines for selecting and maintaining equipment to accomplish the operational goals of the school nutrition program.**

**ESSENTIAL**

**Knowledge Statements**

- Knows factors that influence the selection of equipment.
- Knows federal, state, and local regulations that guide the purchase and disposal of equipment.
- Knows fundamentals for preparing equipment specifications.
- Knows importance of verifying the school nutrition site's capacity to support the energy/utility requirements of selected equipment.
- Knows importance of evaluating energy efficiency of equipment.
- Knows the equipment industry distribution channels and foodservice equipment safety/quality approval agencies that influence the selection of equipment. (e.g., NSF International, AGA, UL, ISO).

**Skill Statements**

- Ensures that equipment selected is appropriate for facility and operational needs to meet short and long term goals of the school nutrition program.

COMPETENCY 1.2 continued

- Creates procedures for the proper care, preventive maintenance, and repair of equipment.
- Seeks information from manufacturers' representatives and/or input from foodservice consultant (if applicable) to identify equipment best suited for facility and operational needs.
- Evaluates school nutrition managers' requests and recommendations for new equipment.
- Creates a strategic plan describing the short and long term equipment needs at each school nutrition site.

## ADVANCED

### Knowledge Statements

- None

### Skill Statements

- Seeks information on energy efficiency of equipment from independent energy testing laboratories.

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

## COMPETENCY 1.3

Establishes an environmentally responsible school nutrition program.

## ESSENTIAL

### Knowledge Statements

- Knows sanitation standards and safety practices related to establishing an environmentally responsible school nutrition program (e.g., energy conservation, recycling, waste disposal).
- Knows available options and associated costs for environmentally responsible initiatives.

## COMPETENCY 1.3 continued

### Skill Statements

- Develops procedures and monitors implementation of initiatives that promote an environmentally responsible school nutrition program.
- Provides leadership for developing school nutrition environmental management policies that are responsible and enforceable.
- Facilitates training for school nutrition staff on energy conservation techniques, waste management procedures, and environmental protection policies.
- Analyzes cost-effectiveness of initiatives that promote an environmentally responsible school nutrition program (e.g., energy conservation, recycling, waste disposal).

## ADVANCED

### Knowledge Statements

- None

### Skill Statements

- Establishes guidelines for environmentally responsible purchasing practices such as recycled materials and source reduction packaging.
- Develops and implements waste management procedures according to standards established by the Environmental Protection Agency, other federal agencies, state, and local governments.

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

## Functional Area 2: Financial Management

### COMPETENCY 2.1

Develops financial management guidelines that support school nutrition program operational goals and comply with regulations.

#### ESSENTIAL

##### Knowledge Statements

- Knows financial goals and objectives of the school district.
- Knows basic principles of accounting and the application of those principles.
- Knows process for budget development, justification, and implementation.
- Knows the impact of changing demographics and enrollment trends on the school nutrition program budget.
- Knows fundamentals of reporting school nutrition program budget as part of the district budget.

##### Skill Statements

- Establishes a pricing structure for meals and food items that follows federal, state, and local guidelines.
- Prepares budgets that appropriately reflect financial goals.
- Collaborates with appropriate district administrators to identify the desired school nutrition program financial outcomes.
- Establishes and/or implements written procedures for collecting, reconciling, depositing, and disbursing funds.
- Analyzes financial statements regularly to make informed financial decisions.
- Reconciles projected annual budget with revenue and expenditure performance routinely and provides documentation to justify variances.
- Evaluates financial performance of individual school nutrition sites and makes adjustments, as necessary.
- Provides budget status to other district administrators, following local guidelines.
- Establishes a system for archiving financial records following federal, state, and local regulations.
- Uses financial management information system software to enhance financial reporting and accountability.

COMPETENCY 2.1 continued

- Shares financial information with school nutrition managers and develops strategies for addressing issues.
- Monitors the appropriate use of external funding, when applicable.

## **ADVANCED**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- Seeks external funding to support school nutrition program initiatives, as appropriate.

## **COMPETENCY 2.2**

**Establishes cost control goals to effectively manage the school nutrition program.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows the importance of appropriate staffing and scheduling to control labor cost.
- Knows the role of the menu in controlling costs.
- Knows methods to determine staff productivity.
- Knows methods for establishing internal and external financial benchmarks.
- Knows the importance of providing cost-effective special functions, as appropriate.
- Knows costs associated with environmentally responsible practices.

### **Skill Statements**

- Controls food cost by implementing standard procedures (e.g., appropriate product ingredients, standardized recipes, accurate portion sizes).
- Controls labor cost by assessing meals served, labor hours, and school nutrition staff benefits.

COMPETENCY 2.2 continued

- Maximizes the use of United States Department of Agriculture (USDA) foods to assist in controlling food cost.
- Establishes internal benchmarks for food and labor cost percentages.
- Identifies costs associated with maintaining a comprehensive technology infrastructure.

## **ADVANCED**

### **Knowledge Statements**

- None

### **Skill Statements**

- Performs cost analysis to justify additional expenses to promote program growth.
- Monitors the cost of job-related injuries.

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

---

## **Functional Area 3: Food Production and Operation Management**

### **COMPETENCY 3.1**

**Develops a management system to ensure high standards for quality food production.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows procedures for documenting and evaluating amounts of food planned, prepared, and served.
- Knows importance of and methods for producing cost-effective, high quality food, and beverages.

### COMPETENCY 3.1 continued

- Knows standards of food quality.
- Knows principles of developing and using standardized recipes.
- Knows food production and distribution systems that allow for efficient use of product, labor, and equipment.
- Knows the importance of production scheduling for optimum holding of food items.
- Knows principles of food science and fundamentals of flavor enhancement related to quantity food production, holding, serving, and appealing food presentation.

#### **Skill Statements**

- Establishes procedures to maintain required daily food production records at each school nutrition site.
- Develops food production planning procedures including, but not limited to, forecasting, production schedules, standardized recipes, and portion control.
- Trains managers in food production and forecasting procedures.
- Selects the most effective food production system for school nutrition sites.
- Develops food quality standards to assist school nutrition staff in evaluating menu items prior to service.
- Maintains current training materials for use by school nutrition managers to train staff on food production techniques.
- Develops guidelines for recipe modification to meet nutrition objectives and increase customer acceptability.
- Coordinates training for school nutrition staff to enhance their culinary and/or catering skills.

## **ADVANCED**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

## **COMPETENCY 3.2**

**Establishes operational systems for managing food production and service.**

### **ESSENTIAL**

#### **Knowledge Statements**

- Knows food preparation techniques and distribution systems that allow for efficient use of product, labor, and equipment.
- Knows staffing and scheduling techniques to achieve operational goals.
- Knows relationship of student meal periods to efficient food production and timely service of meals.
- Knows fundamentals of creating a pleasant, appealing, and safe environment for serving nutritious meals.

#### **Skill Statements**

- Encourages school nutrition managers and staff to produce and serve meals in a customer-friendly environment.
- Establishes and communicates quality customer service standards to the school nutrition staff.
- Ensures a dining environment that promotes good nutrition and healthy eating behaviors.
- Establishes benchmarks for efficient production of meals (e.g., meals per labor hour).
- Demonstrates ability to utilize customer feedback in improving production and service.
- Establishes an effective food distribution system for all school nutrition sites.
- Develops safe and efficient work methods to maximize staff productivity.
- Develops guidelines for work schedules that effectively and efficiently meet operational goals.
- Develops procedures for measuring and evaluating delivery systems, appearance and efficiency of serving area, and serving techniques.

COMPETENCY 3.2 continued

## **ADVANCED**

### Knowledge Statements

- None

### Skill Statements

- None

## **JUST-IN-TIME**

### Knowledge Statements

- None

### Skill Statements

- None

---

## Functional Area 4: Food Security, Sanitation, and Safety

### **COMPETENCY 4.1**

Establishes policies and procedures to ensure food is prepared  
and served in a sanitary and safe environment.

## **ESSENTIAL**

### Knowledge Statements

- Knows basic principles and techniques of foodservice sanitation and food safety.
- Knows federal, state, and local sanitation and food safety requirements.
- Knows principles of foodborne illness prevention.
- Knows fundamentals of Hazard Analysis Critical Control Point (HACCP) -based standard operating procedures.
- Knows the importance of all aspects of food security.

### Skill Statements

- Develops a HACCP-based food safety and sanitation program that meets federal, state, and local regulations.
- Ensures that all food safety inspection deficiencies are addressed competently and in a timely manner.

COMPETENCY 4.1 continued

- Develops a sanitation training program for school nutrition staff.
- Develops emergency procedures and practices for food recalls and foodborne illnesses.
- Establishes communication procedures within the school district regarding food safety issues.
- Conducts routine food safety and sanitation inspections at each school nutrition site and develops corrective action plans, as needed.

## ADVANCED

### Knowledge Statements

- Knows principles of food biosecurity.

### Skill Statements

- None

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

## COMPETENCY 4.2

Provides leadership in creating a safe work environment  
for school nutrition operations.

## ESSENTIAL

### Knowledge Statements

- Knows principles for selecting, storing, using, and maintaining chemical supplies and other hazardous materials.
- Knows principles of creating and maintaining a safe work environment.
- Knows safety standards for foodservice establishments that comply with the Occupational Safety and Health Act (OSHA) and other regulations.

### Skill Statements

- Encourages school nutrition staff participation in creating a safe work environment.

#### COMPETENCY 4.2 continued

- Develops procedures and trains school nutrition staff on proper use, cleaning, and sanitizing of foodservice equipment.
- Ensures that the Material Safety Data Sheets for chemical products are up-to-date and accessible to school nutrition staff.
- Establishes policies for posting workplace safety information.
- Develops safe, effective methods for prevention and control of insects, rodents, and other pest infestations.
- Ensures school nutrition staff training on the proper use of fire extinguishers.
- Ensures compliance with health and safety regulations established by federal (OSHA), state, and local agencies.
- Documents safety training following district guidelines.
- Develops safety requirements and standards for selection and use of chemicals, hazardous materials, and equipment.
- Develops training procedures and safety guidelines for workplace injury prevention and injury response reporting.
- Initiates and/or maintains a needs-based safety training program.

### **ADVANCED**

#### Knowledge Statements

- None

#### Skill Statements

- None

### **JUST-IN-TIME**

#### Knowledge Statements

- None

#### Skill Statements

- None

## **COMPETENCY 4.3**

**Develops a systematic approach to address emergency and disaster situations.**

### **ESSENTIAL**

#### **Knowledge Statements**

- Knows the district's crisis management plan and/or emergency response plan.
- Knows federal, state, and local regulations for providing services during an emergency or crisis.
- Knows importance of providing first aid training (e.g., CPR, Heimlich maneuver, treating minor cuts and burns) to school nutrition staff.

#### **Skill Statements**

- Establishes and communicates a basic plan for dealing with an emergency/disaster situation to school nutrition staff and appropriate school/district staff.
- Establishes a school nutrition crisis management team to develop a plan outlining the functions of school nutrition staff in the event of a crisis.
- Determines the food and supply items to be available for use at each school nutrition site in case of an emergency.
- Ensures first aid training programs are provided to school nutrition staff.
- Develops an emergency feeding plan and trains school nutrition staff on appropriate implementation.
- Develops a plan for communicating with appropriate federal, state, and/or local officials concerning the use of USDA foods for disaster relief.
- Develops a plan to secure food, equipment, and supplies from outside organizations in case of emergencies.

### **ADVANCED**

#### **Knowledge Statements**

- None

#### **Skill Statements**

- Networks with community disaster agencies and maintains current contact information.

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None
- 

## **Functional Area 5: Human Resource Management**

### **COMPETENCY 5.1**

**Establishes a human resource infrastructure for the school nutrition program that complies with school district policies as well as federal, state, and local regulations.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows selection, supervision, promotion, termination, and disciplinary procedures that comply with federal, state, and local regulations and contractual policies, when applicable.
- Knows district policies and procedures for performing human resource functions (e.g., accident reporting, payroll, benefits, immigration, policy acknowledgement, performance appraisal).
- Knows the importance of a school nutrition staff handbook.
- Knows federal, state, and local laws and regulations relevant to human resource management.

### **Skill Statements**

- Interprets and communicates human resource management policies and procedures to school nutrition managers and provides guidance, as needed.
- Interprets and disseminates the school district's human resource policies and procedures to school nutrition staff.
- Maintains accurate school nutrition staff records and other pertinent human resource documentation.

COMPETENCY 5.1 continued

- Reviews and recommends wages, salaries, and fringe benefits that are equitable and competitive.
- Verifies that human resource decisions follow due process established by the school district.
- Monitors and tracks incidence of on-the-job injuries and related liabilities.
- Develops and maintains a school nutrition staff handbook with current organizational chart and information on school nutrition program and district regulations, policies, and procedures.

## ADVANCED

### Knowledge Statements

- Knows principles of risk management related to creating a secure working environment.
- Knows legislation and resources pertaining to collective bargaining and labor union contracts, when applicable.

### Skill Statements

- Participates and/or advises in the collective bargaining process, when applicable.
- Collaborates with district administration on identifying risk management strategies, approaches, and techniques.

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

## COMPETENCY 5.2

Develops and implements a process for recruiting, hiring, retaining, and promoting qualified school nutrition staff in compliance with the school district's written procedures and labor laws.

## ESSENTIAL

### Knowledge Statements

- Knows basic principles of job analysis, job design, job specifications, job descriptions, and performance appraisals.

#### COMPETENCY 5.2 continued

- Knows strategies for effective recruitment, hiring, and retention of school nutrition staff.
- Knows effective job interview techniques that incorporate legally permissible inquiries.
- Knows the importance of staff orientation to assure that new school nutrition staff have appropriate information to perform their jobs.
- Knows strategies for conducting effective performance appraisals.
- Knows factors important to employee satisfaction and strategies to address dissatisfaction.
- Knows the importance of providing professional development opportunities for school nutrition staff.

#### **Skill Statements**

- Develops a staffing plan based on school nutrition delivery systems, student participation, facilities, and services provided.
- Develops job descriptions and job specifications.
- Determines minimum skills and characteristics required for an effective school nutrition staff member.
- Utilizes interviewing techniques and hiring procedures that comply with federal, state, and local guidelines.
- Designs an effective orientation program that introduces new school nutrition staff to the school nutrition program mission, requirements, and goals.
- Establishes a process for conducting performance appraisals that follow district timetables and guidelines.
- Utilizes competency-based performance appraisals to identify school nutrition managers' areas of strength and develop plans for improvement to address weaknesses.
- Trains school nutrition managers to effectively conduct competency-based performance appraisals of school nutrition staff.
- Applies conflict resolution, negotiation, and problem-solving techniques when dealing with school nutrition staff issues.
- Develops and implements a procedure for school nutrition staff to provide feedback for improving productivity and morale.
- Develops contingency staffing plans to operate effectively when positions are vacant.

COMPETENCY 5.2 continued

- Develops and implements a school nutrition staff recognition program, as appropriate.
- Provides school nutrition staff information regarding professional organizations and opportunities for personal and professional development.

**ADVANCED**

**Knowledge Statements**

- None

**Skill Statements**

- None

**JUST-IN-TIME**

**Knowledge Statements**

- None

**Skill Statements**

- None

**COMPETENCY 5.3**

**Designs a comprehensive needs-based training infrastructure that enhances learning and improves job skills.**

**ESSENTIAL**

**Knowledge Statements**

- Knows effective job training methods.
- Knows procedures for documenting staff development and training following district policies.
- Knows methods to assess professional development needs of school nutrition staff.

**Skill Statements**

- Ensures that school nutrition staff have access to training opportunities for acquiring certification, as appropriate.
- Seeks resources for technical information and educational materials appropriate for school nutrition staff training.

COMPETENCY 5.3 continued

## **ADVANCED**

### **Knowledge Statements**

- None

### **Skill Statements**

- Develops a system for evaluating training program effectiveness and makes necessary modifications.
- Develops mentoring and/or management training programs for use in succession planning.

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

---

## **Functional Area 6: Marketing and Communication**

### **COMPETENCY 6.1**

**Develops a systematic approach for marketing the school nutrition program.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows the importance of school nutrition staff in marketing the school nutrition program.
- Knows the importance of involving stakeholders in implementing marketing plans, measuring outcomes, and interpreting results.
- Knows principles of public relations and marketing techniques appropriate for the school community.
- Knows the importance of providing high quality, cost-effective services for special functions.

## COMPETENCY 6.1 continued

### Skill Statements

- Leads the development of a marketing plan that integrates marketing objectives, strategies, implementation, and evaluation.
- Aligns the school nutrition marketing plan with district marketing initiatives.
- Designs and implements an effective public relations program to maintain a positive image for the school nutrition program.
- Responds appropriately to school nutrition program publicity generated by the media.
- Networks with school nutrition professionals to share best practices in marketing.
- Evaluates the school nutrition marketing plan and promotional campaigns periodically and modifies ineffective initiatives.
- Evaluates catering as a viable marketing tool.

## ADVANCED

### Knowledge Statements

- Knows methods to assess the impact of marketing initiatives.

### Skill Statements

- None

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

## COMPETENCY 6.2

Develops a customer service infrastructure to promote the school nutrition program.

### ESSENTIAL

#### Knowledge Statements

- Knows techniques for providing high quality customer service.
- Knows the importance of customer feedback on menu planning.
- Knows fundamentals of creating a pleasant, appealing, and safe dining experience.
- Knows food merchandising techniques to enhance the presentation of food.
- Knows methods to collect and use data on customer acceptability of school meals.

#### Skill Statements

- Trains school nutrition managers and staff to enhance customer service systems.
- Develops procedures to maintain the aesthetic qualities of menu items throughout the meal period.
- Empowers school nutrition managers to address and resolve customer service issues.
- Ensures student involvement in recipe and product testing to determine customer acceptability.
- Develops procedures for collecting, analyzing, and addressing customer feedback.

### ADVANCED

#### Knowledge Statements

- None

#### Skill Statements

- None

### JUST-IN-TIME

#### Knowledge Statements

- None

#### Skill Statements

- None

## COMPETENCY 6.3

Establishes a communication infrastructure with stakeholders to promote the school nutrition program.

### ESSENTIAL

#### Knowledge Statements

- Knows importance of networking within the community to build support for the school nutrition program.
- Knows appropriate channels for effectively communicating with school nutrition program stakeholders.

#### Skill Statements

- Communicates the relationship between nutrition adequacy and educational performance of children.
- Coordinates the use of multiple approaches for informing stakeholders of menu, nutrition information, and other services available (e.g., web site, newsletter, printed menus).
- Encourages school nutrition staff to support and participate in school district nutrition/wellness initiatives.
- Represents the school nutrition program at conferences and gives presentations on school district initiatives, program best practices, challenges, and innovations, as requested.
- Develops an ongoing system of informing stakeholders of policy updates and current school nutrition program information.
- Coordinates with the school district public relations liaison to prepare program information and press releases for stakeholders and media.
- Communicates school nutrition research findings to stakeholders, when applicable.
- Encourages school nutrition managers to participate in general staff meetings at school sites.

### ADVANCED

#### Knowledge Statements

- None

#### Skill Statements

- None

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

---

## Functional Area 7: Menu and Nutrition Management

### COMPETENCY 7.1

Develops guidelines for planning menus that comply with nutrition objectives and support operational goals of the school nutrition program.

## ESSENTIAL

### Knowledge Statements

- Knows the role of the menu in controlling costs within a school nutrition program.
- Knows the relationship of menu planning to the availability of USDA foods, purchasing, food production, and productivity.
- Knows menu planning principles.
- Knows current USDA menu planning options and requirements.
- Knows federal, state, and local regulations governing food and beverage sales.
- Knows the *Dietary Guidelines for Americans*, *USDA Menu Planner for Healthy School Meals*, and *Food Buying Guide* as menu planning tools.
- Knows menu planning and service techniques for children with special food and/or nutrition needs, as appropriate.
- Knows the influence of customer feedback on menu planning.
- Knows the relationship between menu planning and the design of the facility.

### Skill Statements

- Plans nutritionally sound menus that comply with federal, state, and local regulations.
- Develops and implements a menu system to maximize use of USDA foods.

COMPETENCY 7.1 continued

- Develops an effective system for menu planning that includes, but is not limited to, costing, forecasting, nutrient analysis, variety, and customer preferences.
- Collaborates with school staff, teachers, parents, physicians, and other health professionals to meet the special food and/or nutrition needs of children, as appropriate.
- Ensures all menu items served are consistent with nutrition objectives and contribute to the development of healthy eating habits.
- Develops procedures for collecting customer feedback that may include, but is not limited to, surveys, taste panels, and menu committees.
- Plans menus to incorporate cultural preferences and introduce students to a variety of foods.

**ADVANCED**

**Knowledge Statements**

- None

**Skill Statements**

- None

**JUST-IN-TIME**

**Knowledge Statements**

- None

**Skill Statements**

- None

|   |
|---|
| <p style="text-align: center;"><b>COMPETENCY 7.2</b><br/><b>Provides leadership to support the nutrition and wellness initiatives within the school district.</b></p> |
|---|

**ESSENTIAL**

**Knowledge Statements**

- Knows the importance of school nutrition services and nutrition education as a component of the coordinated school health education program.
- Knows the importance of providing nutrition education training for school nutrition staff.

## COMPETENCY 7.2 continued

- Knows resources for the development and evaluation of nutrition education materials and activities.
- Knows age-appropriate methods for promoting nutrition education.

### Skill Statements

- Promotes healthy eating habits and provides guidelines for selecting healthful meals and snacks through nutrition education and appropriate marketing in the school cafeteria.
- Utilizes appropriate nutrition education and promotional materials to encourage healthy eating behaviors.
- Supports nutrition education programs for students, school nutrition staff, administrators, teachers, and other school district staff.
- Promotes activities to increase wellness and nutrition awareness among students, administrators, teachers, and other school district staff.
- Forms partnerships with parents, students, and the education community to support an integrated approach to nutrition education.
- Evaluates the effectiveness of nutrition education programs initiated by the school nutrition program.

## ADVANCED

### Knowledge Statements

- Knows effective strategies for positively influencing customers' eating behaviors.

### Skill Statements

- None

## JUST-IN-TIME

### Knowledge Statements

- None

### Skill Statements

- None

# Functional Area 8: Procurement and Inventory Management

## COMPETENCY 8.1

Develops procurement guidelines that comply with established regulations and support operational goals of the school nutrition program.

### ESSENTIAL

#### Knowledge Statements

- Knows ethical practices for procurement.
- Knows federal, state, and local procurement regulations, policies, and procedures governing all school nutrition program purchases.
- Knows the relationship of standardized recipes to accurate ordering and inventory management.
- Knows methods to project food and supply needs.
- Knows fundamentals of developing specifications for food products, supplies, and equipment that incorporate quality and/or performance indicators.
- Knows guidelines for procurement and processing of USDA foods following federal and state regulations.
- Knows basic principles of requests for proposals (RFP), formal bidding, and informal bidding (quotes).
- Knows principles for purchasing and storing chemical supplies and other hazardous materials.
- Knows factors that guide the procurement of equipment.
- Knows the structure of procurement channels from manufacturer to the school nutrition program for food, supplies, and equipment.

#### Skill Statements

- Develops and monitors procurement procedures for school nutrition sites to order, receive, and store products.
- Evaluates current purchasing practices to determine effectiveness.
- Develops appropriate bid documents that include product specifications, usages, and special instructions/conditions following federal, state, and local regulations.
- Evaluates bids/quotes and makes purchase recommendations following federal, state, and local regulations.

#### COMPETENCY 8.1 continued

- Analyzes technical support, training availability, maintenance service availability, and cost of upgrades when considering new purchases.
- Utilizes manufacturers, local representatives, and dealers to answer questions and provide cost information on available equipment.
- Evaluates purchasing methods (e.g., bid buying, prime vendors, group purchasing) and selects most appropriate method for the school nutrition program.
- Develops product specifications that ensure broad customer acceptability and nutrition integrity utilizing pre-bid conferences, product testing/screening, and product comparison.
- Monitors current market conditions that influence procurement decisions (e.g., price, supply, demand).
- Updates product knowledge by communicating with industry and other foodservice professionals.

### **ADVANCED**

#### **Knowledge Statements**

- None

#### **Skill Statements**

- Establishes procurement guidelines for environmentally responsible purchasing practices.
- Provides a profile describing the school nutrition program to assist industry representatives in meeting procurement needs.

### **JUST-IN-TIME**

#### **Knowledge Statements**

- None

#### **Skill Statements**

- None

## COMPETENCY 8.2

Establishes operational procedures to effectively manage receiving and inventory systems.

### ESSENTIAL

#### Knowledge Statements

- Knows fundamentals of effective receiving procedures.
- Knows methods for effective inventory control.
- Knows methods for effective implementation of a central warehouse system, when appropriate.

#### Skill Statements

- Develops delivery requirements that address product quality indicators (e.g., temperature upon delivery and receipt, packaging), time, and quantity.
- Develops and communicates receiving procedures to ensure that products received match delivery requirements.
- Develops and communicates procedures for returning and crediting unacceptable merchandise and ensuring that only authorized substitutions are accepted.
- Develops procedures for inventory control that address the delivery date, storage, and turnover rate of food products and supplies.
- Develops inventory procedures to keep operating costs at a realistic minimum.
- Develops and updates systems for tracking inventory and use of USDA foods.
- Ensures storage areas are temperature controlled, properly maintained, well-ventilated, and adequately secured.
- Creates an effective food and supply distribution system to all school nutrition sites, when appropriate.

### ADVANCED

#### Knowledge Statements

- None

#### Skill Statements

- None

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

---

## **Functional Area 9: Program Management and Accountability**

### **COMPETENCY 9.1**

**Establishes a system to ensure nutritional, financial, and regulatory accountability of the school nutrition program.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows federal, state, and local regulations and policies governing the school nutrition program.
- Knows current government standards, laws, and regulations that support the nutrition objectives of the school nutrition program.
- Knows the records that are required for federal, state, and local compliance and the importance of accuracy and timeliness.
- Knows importance of following USDA guidelines when planning menus.
- Knows regulations for utilizing USDA foods.
- Knows federal, state, and local regulations governing competitive food sales.
- Knows the specifics of the annual School Food Authority Program Agreement and the associated responsibilities of the school district.
- Knows school nutrition program audit procedures and administrative review requirements.
- Knows civil rights related requirements and regulations.
- Knows regulations, requirements, and liabilities of serving children with special food and/or nutrition needs.

#### COMPETENCY 9.1 continued

- Knows local wellness policy requirements.
- Knows federal, state, and local regulations for responding to emergency situations and use of USDA foods.
- Knows summer feeding or seamless summer feeding regulations, when appropriate.

#### Skill Statements

- Ensures all applications for meal benefits are correctly approved and verified according to USDA regulations.
- Monitors a HACCP-based food safety and sanitation program that meets federal, state, and local regulations.
- Ensures the point-of-sale (POS) system used in the school nutrition program is reliable and provides accurate data in a timely manner.
- Develops and implements procedures to maintain accurate and appropriate records that comply with federal, state, and local regulations.
- Responds to auditors appropriately during reviews of the school nutrition program.
- Establishes an effective system for preparing and submitting reports according to federal, state, and local regulations.
- Performs internal reviews/audits on all aspects of the program to identify and control problem areas.
- Complies with federal, state, and local regulations concerning the sale of competitive food items.
- Develops policies and procedures to accommodate children with special food and/or nutrition needs.
- Develops guidelines for implementing the components of the local wellness policy that are pertinent to the school nutrition program.
- Evaluates the feasibility of providing additional services to increase participation and meet nutrient needs of children (e.g., breakfast options, grab and go meals, vended reimbursable meals).

### **ADVANCED**

#### Knowledge Statements

- None

#### Skill Statements

- None

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

## **COMPETENCY 9.2**

**Provides leadership to position the school nutrition program as an integral component of the school district.**

## **ESSENTIAL**

### **Knowledge Statements**

- Knows importance of developing school nutrition program policies and procedures that support the mission and vision of the school district.
- Knows strategies for building a cohesive school nutrition staff (e.g., team building, conflict resolution, negotiation, problem solving techniques).
- Knows fundamentals of continuous quality improvement processes.
- Knows district policies and practices regarding environmentally responsible practices.

### **Skill Statements**

- Conducts regular meetings with school nutrition managers to evaluate program performance, facilitate problem solving, and encourage information sharing.
- Follows the district reporting structure when creating and/or implementing policies and procedures.
- Interprets district policies and procedures for school nutrition staff.
- Seeks district administration input on continuous quality improvement activities for the school nutrition program, as appropriate.
- Verifies with district administration that the school nutrition program emergency/disaster plan is aligned with the district plan.
- Communicates with appropriate state and/or federal officials concerning the use of USDA foods for disaster relief.
- Develops, implements, and monitors environmental practices according to established standards.

COMPETENCY 9.2 continued

**ADVANCED**

**Knowledge Statements**

- Knows importance of evaluating research and current trends for application to the school nutrition program.
- Knows the strategic planning process.

**Skill Statements**

- Incorporates the district's mission/vision statement when conducting strategic planning activities for the school nutrition program.

**JUST-IN-TIME**

**Knowledge Statements**

- None

**Skill Statements**

- None

## Functional Area 10: Technology and Information Systems

### COMPETENCY 10.1

Establishes a comprehensive technology infrastructure to achieve the operational goals of the school nutrition program.

#### ESSENTIAL

##### Knowledge Statements

- Knows the importance of properly trained school nutrition staff to maximize the effectiveness of technology and information systems.
- Knows available technology resources in the district.
- Knows the basic uses of word processing, database, spreadsheet, and presentation software.
- Knows importance of training programs and technical support provided by software and hardware vendors.
- Knows available hardware and/or software that can maximize school nutrition program efficiency (e.g., POS systems, nutrient analysis software, automatic payment systems, financial management software).
- Knows importance of continuous upgrades for technology and information systems.
- Knows federal, state, and local procedures for selection, purchase, and disposal of hardware and/or software systems.

##### Skill Statements

- Utilizes technology and information systems to generate and submit reports, as appropriate.
- Selects appropriate software to support the functionality of school nutrition operations.
- Evaluates and selects appropriate software and hardware that integrates with the technology infrastructure of the school district.
- Determines appropriate technical support for technology and information systems (e.g., outsourcing, in-house staff, vendor-provided).
- Develops contingency plans for use in the event of hardware and/or software failure, such as performing backup of information periodically.

COMPETENCY 10.1 continued

- Ensures that software enhancements, updates, and user manuals are provided in a timely manner by vendors/consultants.
- Analyzes technical support and training availability, maintenance contracts, and cost of upgrades when making technology decisions.
- Develops procedures for proper care and maintenance of hardware and software systems.
- Utilizes available resources to ensure that information technology systems are meeting the operational needs of the school nutrition program.

## **ADVANCED**

### **Knowledge Statements**

- None

### **Skill Statements**

- Coordinates a team-based needs assessment to guide technology selection, upgrade, and use.

## **JUST-IN-TIME**

### **Knowledge Statements**

- None

### **Skill Statements**

- None

---

---

## **SAMPLE JOB DESCRIPTION TEMPLATE**

---

---

# **SAMPLE JOB DESCRIPTION TEMPLATE**

## *District-Level School Nutrition Professionals*

### **General Function and Scope**

District-level school nutrition professionals oversee all aspects of the district-wide school nutrition program. They perform a variety of job functions essential to the successful operation of the district's school nutrition program. The job functions include facilities and equipment management; financial management; food production and operation management; food security, sanitation, and safety; human resource management; marketing and communication; menu and nutrition management; procurement and inventory management; program management and accountability; and technology and information systems. The job responsibilities encompassed within these functional areas can be divided into one or more district-level positions as deemed appropriate for the school nutrition program.

District-level school nutrition professionals partner with others in the school nutrition program, school district, and community to operate a sound nutrition assistance food program while following federal, state, and local guidelines. The school nutrition program is to provide an environment that supports healthy food habits of students while maintaining program integrity, fiscal accountability, and customer satisfaction.

### **FUNCTIONAL AREAS OF RESPONSIBILITIES**

#### **Facilities and Equipment Management**

- Provides leadership in designing and planning facilities that support the operational goals of the school nutrition program.
- Develops guidelines for selecting and maintaining equipment to accomplish the operational goals of the school nutrition program.
- Establishes an environmentally responsible school nutrition program.

#### **Financial Management**

- Develops financial management guidelines that support school nutrition program operational goals and comply with regulations.
- Establishes cost control goals to effectively manage the school nutrition program.

### **Food Production and Operation Management**

- Develops a management system to ensure high standards for quality food production.
- Establishes operational systems for managing food production and service.

### **Food Security, Sanitation, and Safety**

- Establishes policies and procedures to ensure food is prepared and served in a sanitary and safe environment.
- Provides leadership in creating a safe work environment for school nutrition operations.
- Develops a systematic approach to address emergency and disaster situations.

### **Human Resource Management**

- Establishes a human resource infrastructure for the school nutrition program that complies with school district policies as well as federal, state, and local regulations.
- Develops and implements a process for recruiting, hiring, retaining, and promoting qualified school nutrition staff in compliance with school district's written procedures and labor laws.
- Designs a comprehensive needs-based training infrastructure that enhances learning and improves job skills.

### **Marketing and Communication**

- Develops a systematic approach for marketing the school nutrition program.
- Develops a customer service infrastructure to promote the school nutrition program.
- Establishes a communication infrastructure with stakeholders to promote the school nutrition program.

### **Menu and Nutrition Management**

- Develops guidelines for planning menus that comply with nutrition objectives and support operational goals of the school nutrition program.
- Provides leadership to support the nutrition and wellness initiatives within the school district.

### **Procurement and Inventory Management**

- Develops procurement guidelines that comply with established regulations and support operational goals of the school nutrition program.
- Establishes operational procedures to effectively manage receiving and inventory systems.

FUNCTIONAL AREAS OF RESPONSIBILITIES *continued*

**Program Management and Accountability**

- Establishes a system to ensure nutritional, financial, and regulatory accountability of the school nutrition program.
- Provides leadership to position the school nutrition program as an integral component of the school district.

**Technology and Information Systems**

- Establishes a comprehensive technology infrastructure to achieve the operational goals of the school nutrition program.



---

NATIONAL FOOD SERVICE MANAGEMENT INSTITUTE  
The University of Mississippi  
P.O. Drawer 188  
University, MS 38677-0188  
[www.nfsmi.org](http://www.nfsmi.org)  
1-800-321-3054

R-136-09 (GY 07)

FACILITIES AND EQUIPMENT MANAGEMENT

*Financial Management*

**FOOD PRODUCTION AND OPERATION MANAGEMENT**

**FOOD SECURITY, SANITATION, AND SAFETY**

*Human Resource Management*

MARKETING AND COMMUNICATION

**MENU AND NUTRITION MANAGEMENT**

**PROCUREMENT AND INVENTORY MANAGEMENT**

**PROGRAM MANAGEMENT AND ACCOUNTABILITY**

*Technology and Information Systems*