

APPENDIX E

PROCEDURES FOR MENU SURVEY TRAINING

**School Nutrition Dietary
Assessment Study IV**

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PROCEDURES FOR REVIEWING MENU SURVEY FORMS AND INSTRUCTIONS

Toward the end of Week 1 (usually on the Thursday or Friday before the target week), the TA will conduct a training with FSMs, consisting of a form-by-form review of the information to be collected for the Menu Survey. You will have some flexibility in how the Menu Survey training calls are structured, and should use relevant information gathered from the SFA director recruitment and introductory call with FSMs in planning the calls. Since FSMs within an SFA will be trained together (in most cases), it is important to organize the training call in the most efficient manner. Use the following step-by-step procedures as general guidelines for conducting the training call.

Prior to the Menu Survey Training Call:

1. Read through the information on school food service characteristics collected from the SFA director and the information you learned about each school during the introductory call earlier in the week. Key information to use in determining what to cover (and when) in the training call includes:
 - Whether school offers the SBP
 - Whether school offers reimbursable snacks through the NSLP Afterschool Snack Program (Note: the majority of schools that participate in this program will be elementary schools; however, there may be a few secondary schools that participate.)
 - Whether meals are prepared partly or fully in off-site kitchen
 - Whether school participates in the FFVP
 - Whether it is a Provision 2 or 3 school
 - Whether school sells foods or beverages on an a la carte basis at lunch and/or breakfast?
 - Whether school offers self-serve or made-to-order food bars

Introductory Information:

1. At the start of the training call, introduce yourself and remind the respondents that you are calling to go over the Menu Survey with them. Confirm or ask the respondents to have the Menu Survey Folder in front of them during the call. It is important to recognize that some schools will not have opened or looked through the Menu Survey materials prior to your call, while others will have reviewed the materials and be ready to ask questions. Assessing where the respondents are early on will make the call go more smoothly.

2. Begin by telling the FSMs that the objective of the Menu Survey is to obtain a complete and accurate description of the foods offered and served in their school food service program during a five-day period, referred to as the *target week*. Emphasize that the information being collected is information that they are very familiar with and work with every day. Explain that the information they provide will be combined with information from many other schools across the country and will be used to measure the nutrient content of school meals and snacks.
3. Explain that the Menu Survey Folder they received contains an instruction manual that describes the Menu Survey and provides easy-to-follow instructions and examples to help them as they complete their own survey forms. The sample completed forms will make it easier to understand what is needed when filling out the forms. Explain that the purpose of this training call is to supplement the guidance provided in the instruction manual.
4. Ask the respondent to locate the envelope labeled, “Instructions for Menu Survey,” and have the respondents locate and confirm that they have received each labeled envelope containing the appropriate blank forms. Refer to the instruction manual and sample completed forms, and briefly describe each form. If the respondents will not be completing certain forms (e.g., the school doesn’t offer a self-serve food bar or doesn’t offer afterschool snacks), this is a good time to let the respondent know that they can ignore the forms that are not applicable to their school.
5. Review the “General Guidelines for Completing the Menu Survey” section (page 4) of the instruction manual. This is a good time to point out to respondents that the forms can be filled out in pieces, each day of the target week, rather than all at one time.

Review of the Menu Survey Forms:

1. Ask the respondents to first pull out the sample **Daily Meal Counts Form**. Review the information to be provided and answer any questions that may come up. Be sure the respondents understand that the information on a la carte sales should include total dollars from all the various points of sale operated by the school food service (cafeteria line, snack bar, vending machine, etc.).
2. Next, review the **Reimbursable Foods Form** by explaining the purpose of the form and walking the FSMs through the instructions provided in the instruction manual. Respondents should follow along as you describe both the lunch and breakfast (if offered) Reimbursable Foods Forms. Refer the respondents to the sample completed

forms to provide examples of the information needed and the columns in which it will be recorded.

3. When explaining the **Self-Serve/Made-to-Order Bar Form** and **Recipe Forms**, refer the respondents to the examples provided in the sample completed forms to help them understand what information is needed. Also, be sure to direct the respondents back to the Reimbursable Foods Form to show how the forms relate to each other.
4. For the **A La Carte Foods Checklist**, be sure to let the respondents know that this form (unlike the Reimbursable Foods Form) is to be completed *for one day only*—the day of the target week that is specified on the front of the Menu Survey Folder. Instruct the respondents to complete the first question on the cover page of the checklist, even if the school does not sell foods or beverages on an a la carte basis or sells only milk (and no other foods or beverages). Direct respondents to the sample completed form to point out the different columns for foods sold at breakfast and lunch, and mention that foods not pre-listed on the checklist can be recorded on the form.
5. For schools that offer the NSLP Afterschool Snack Program (mostly elementary schools), explain the purpose of the **Afterschool Snack Form** and guide the respondent through the instructions for completing the form. Refer the respondent to examples provided in the sample completed form while reviewing the instructions. By this time in the call, the respondent should be familiar with the layout of the form and the information needed since it is very similar to the Reimbursable Foods Form.
6. Once you have explained all of the forms and answered questions, refer respondents to the **Daily Reminder List** and suggest that they store or post the list in an easily accessible location. This card provides tips for getting organized before the target week, a summary of daily activities during the week, and tasks to be completed at the end of the target week.

Closing Information:

1. Before ending the call, ask the respondents if there are any remaining questions. Tell the respondents that you will follow-up with each of them during the target week to review instructions, assist with completing forms, and answer any questions as needed. Remind the respondents to call the toll-free technical assistance line if they have questions or need assistance at any time before, during, or after the target week. Lastly, remember to thank the respondent for their time and for participating in the study.