

APPENDIX I

SFA DIRECTOR RECRUITING TELEPHONE SCRIPT

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SFA DIRECTOR RECRUITING TELEPHONE SCRIPT

Note: The burden associated with gathering and submitting the requested documents is included in the disclosure statement on Appendix A.

OMB Control No.: 0584-0606
Expiration Date: 03/31/2019

Hello, may I please speak with [SFA Director Name]?

If the director asks why you're calling or who you are:

My name is [Recruiter Name]. I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica] to follow up on an email I sent you about a new U.S. Department of Agriculture, Food and Nutrition Service study in which your SFA was selected to participate. The study is looking at the cost of producing reimbursable school meals in [Alaska/Hawaii/Guam/Puerto Rico/the U.S. Virgin Islands]. I am calling to schedule a telephone interview with you and answer any questions that you may have about the study.

If gatekeeper asks why you are calling and who you are:

My name is [Recruiter Name] I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica] on behalf of the U.S. Department of Agriculture, Food and Nutrition Service to follow up on an email [IF YOU HAVE NOT RECEIVED RESPONSE FROM EMAIL: I sent to [Mr./Ms. Director Last Name]/IF YOU HAVE RECEIVED RESPONSE FROM EMAIL: [Mr./Ms. Director Last Name] sent me] about scheduling an interview to learn more about the cost of producing reimbursable school meals in [Alaska/Hawaii/Guam/Puerto Rico/the U.S. Virgin Islands]. I am calling today to schedule the interview. May I please speak to him/her?

If the person does not want to assist until he/she sees the email:

I can send you a copy of the email. What is your name and email address?

NAME: _____

EMAIL ADDRESS: _____

I'll send you a copy and call back in a few minutes to give you a chance to review it. Thank you for your help.

If asked for more details:

The U.S. Department of Agriculture, Food and Nutrition Service has contracted with Mathematica Policy Research to conduct the Outlying Areas Cost Study Feasibility Assessment. The purpose of the assessment is to determine the extent of information available about the costs of reimbursable meals for

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0584-0606. The time required to complete this information collection is estimated to average 20 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

the National School Lunch Program and School Breakfast Program. Reimbursement rates for school meals sold in the contiguous 48 States and the District of Columbia are assessed periodically using a rigorous cost study methodology applied to a sample of public SFAs and schools. That cost study methodology has never been applied in outlying areas, including Alaska, Hawaii, Guam, Puerto Rico, and the U.S. Virgin Islands. This study is important because an accurate assessment of meal costs in [Alaska/Hawaii/Guam/Puerto Rico/the U.S. Virgin Islands] could help adjust per-meal reimbursement rates in your [State/Territory]. [IF HAWAII OR USVI: Your State Child Nutrition agency director, [State CN Agency Director Name], is also being asked to participate. The study is not an audit. I am calling today to confirm a time for the interview with the SFA director and the district business manager.

If asked from where you are calling:

I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica]. Mathematica and its partners, Insight Policy Research and Agralytica, will assess whether the methodology can be used to determine the cost of producing reimbursable lunches and breakfasts in [Alaska/Hawaii/Guam/Puerto Rico/the U.S. Virgin Islands].

If the director is not available and you have received a response to the email:

The SFA director recently emailed me with a time that would work for him/her and the business manager for the interview. I wanted to confirm the time with the director and review the documents that he/she should send to me before the phone call. May I leave [Mr./Ms. Director Last Name] a voicemail now, and could you please tell me when it would be a good time to reach him/her?

CALLBACK DATE AND TIME: _____

VOICEMAIL MESSAGE: [Mr./Ms. Director Last Name], my name is [Recruiter Name]. I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica] to follow up on an email I sent you about a USDA Food and Nutrition Service study in which your SFA has been selected to participate. I'd like to speak with you to confirm the interview time of [Date/Time] and answer any questions you may have. I can be reached at [Email] or [Telephone Number]. Thank you.

If the director is not available and you have not received a response to the email:

I sent [Mr./Ms. Director Last Name] an email to [Email]. Is this address correct?

- IF NO: May I have his/her correct email address?

EMAIL ADDRESS: _____

May I leave [Mr./Ms. Director Last Name] a voicemail now, and could you please tell me when it would be a good time to reach him/her?

CALLBACK DATE AND TIME: _____

VOICEMAIL MESSAGE: [Mr./Ms. Director Last Name], my name is [Recruiter Name]. I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica] to follow up on an email I sent you about a USDA Food and Nutrition Service study in which your SFA has been selected to participate. I'd like to speak with you to schedule a telephone interview and answer any questions you may have. I can be reached at [Email] or [Telephone Number]. Thank you.

If told you should speak to someone else:

What is that person's name and title?

ALTERNATE'S NAME: _____

ALTERNATE'S TITLE: _____

Can you give me his/her email address and telephone number?

EMAIL ADDRESS: _____

TELEPHONE NUMBER: _____

Could I please talk with [Alternate Name] now?

- IF NO: May I leave [Alternate Name] a voicemail now, and could you please tell me when it would be a good time to reach him/her?

CALLBACK DATE AND TIME: _____

VOICEMAIL MESSAGE: [Alternate Name], my name is [Recruiter Name]. I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica] to follow up on an email I recently sent [Mr./Ms. Director Last Name] about a USDA Food and Nutrition Service study in which your SFA has been selected to participate. I understand you may be the preferred person to contact about the study. I will send you some information about the study and then call you back. I can be reached at [Email] or [Telephone Number]. Thank you.

- IF YES: PROCEED TO NEXT SECTION.

If speaking with the director/alternate:

Hello, my name is [Recruiter Name]. I'm calling from [Mathematica Policy Research/Insight Policy Research/Agralytica]. I recently emailed [you/Mr./Ms. Director Last Name] about the Outlying Areas Cost Study Feasibility Assessment, which we're conducting on behalf of the USDA Food and Nutrition Service.

- IF DIRECTOR CONFIRMED INTERVIEW TIME: Thank you for replying with your availability for the interview on [Date/Time]. I want to be sure you confirmed your district business manager is available during the first part of the interview. Does that time still work for both of you?
 - o IF YES: Great. I will send both of you a meeting invitation with instructions to join the call. Can you please give me the business manager's name, email address, and phone number? Will the two of you participate on the same telephone line or different telephone lines? And in case I need to reach you on the day of the interview, what is the number I should use?

BUSINESS MANAGER'S NAME: _____

BUSINESS MANAGER'S EMAIL ADDRESS: _____

BUSINESS MANAGER'S TELEPHONE NUMBER: _____

SAME TELEPHONE LINE DIFFERENT TELEPHONE LINES

DIRECTOR'S TELEPHONE NUMBER: _____

- IF NO: That's okay. Let's find another time when both you and the business manager are able to participate. [SCHEDULE DATE/TIME.] Great. I will send both of you a meeting invitation with instructions to join the call. Can you please give me the business manager's name, email address, and phone number? Will the two of you participate on the same telephone line or different telephone lines? And in case I need to reach you on the day of the interview, what is the number I should use?

INTERVIEW DATE AND TIME: _____

BUSINESS MANAGER'S NAME: _____

BUSINESS MANAGER'S EMAIL ADDRESS: _____

BUSINESS MANAGER'S TELEPHONE NUMBER:

SAME TELEPHONE LINE DIFFERENT TELEPHONE LINES

DIRECTOR'S TELEPHONE NUMBER: _____

- IF DIRECTOR DID NOT CONFIRM INTERVIEW TIME: In my email I offered some possible dates and times for an interview. I would like to speak with both you and your district business manager during the first part of the interview, so let's see what times might work. [SCHEDULE DATE/TIME.] Great. I will send both of you a meeting invitation with instructions to join the call. Can you please give me the business manager's name, email address, and phone number? Will the two of you participate on the same telephone line or different telephone lines? And in case I need to reach you on the day of the interview, what is the number I should use?

INTERVIEW DATE AND TIME: _____

BUSINESS MANAGER'S NAME: _____

BUSINESS MANAGER'S EMAIL ADDRESS: _____

BUSINESS MANAGER'S TELEPHONE NUMBER:

SAME TELEPHONE LINE DIFFERENT TELEPHONE LINES

DIRECTOR'S TELEPHONE NUMBER: _____

- IF DIRECTOR DID NOT PROVIDE SCHOOL CONTACT INFORMATION: The next thing I'd like to do today is get the contact information for the school nutrition managers and principals of some schools in your SFA. We would like to interview staff from schools with different characteristics. Please consider schools that would be willing to participate in interviews, and that vary in whether they: (1) have staff who are not in the food service department but work on food service activities, (2) purchase any foods directly versus all SFA-level purchasing, (3) prepare food onsite versus receive meals from a central kitchen or production kitchen, (4) sell competitive foods versus do not sell competitive foods. The schools should be different types (for example, elementary, middle, and high schools). Can you please give me the school names and mailing

addresses, plus the names, email addresses, and telephone numbers for the principals and school nutrition managers in [Number] schools, and describe why you are recommending each school? [RECORD THE INFORMATION IN THE SPACE BELOW.]

- **IF DIRECTOR PROVIDED SCHOOL CONTACT INFORMATION:** The next thing I'd like to do today is review the schools you identified for interviews with school nutrition managers and principals. You may remember we are seeking variation in whether the schools: (1) have staff who are not in the food service department but work on food service activities, (2) purchase any foods directly versus all SFA-level purchasing, (3) prepare food onsite versus receive meals from a central kitchen or production kitchen, (4) sell competitive foods versus do not sell competitive foods. We'd also like representation of elementary, middle, and high schools. Can you please confirm the information you shared for each school and let me know the reasons you selected each one? [RECORD THE INFORMATION IN THE SPACE BELOW.]

SCHOOL 1 NAME: _____

MAILING ADDRESS: _____

PRINCIPAL'S NAME: _____

PRINCIPAL'S EMAIL ADDRESS: _____

PRINCIPAL'S TELEPHONE NUMBER: _____

SNM'S NAME: _____

SNM'S EMAIL ADDRESS: _____

SNM'S TELEPHONE NUMBER: _____

REASON: _____

SCHOOL 2 NAME: _____

MAILING ADDRESS: _____

PRINCIPAL'S NAME: _____

PRINCIPAL'S EMAIL ADDRESS: _____

PRINCIPAL'S TELEPHONE NUMBER: _____

SNM'S NAME: _____

SNM'S EMAIL ADDRESS: _____

SNM'S TELEPHONE NUMBER: _____

REASON: _____

SCHOOL 3 NAME: _____

MAILING ADDRESS: _____

PRINCIPAL'S NAME: _____

PRINCIPAL'S EMAIL ADDRESS: _____

PRINCIPAL'S TELEPHONE NUMBER: _____

SNM'S NAME: _____

SNM'S EMAIL ADDRESS: _____

SNM'S TELEPHONE NUMBER: _____

REASON: _____

- IF DIRECTOR DID NOT PROVIDE CENTRAL KITCHEN INFORMATION: Does your SFA have a central kitchen that prepares school meals for any schools in the SFA?
 - o IF NO: GO TO NEXT SECTION.
 - o IF YES: Can you please give me the name, email address, telephone number, and mailing address for the kitchen manager in the central kitchen?

SNM'S NAME: _____

SNM'S EMAIL ADDRESS: _____

SNM'S TELEPHONE NUMBER: _____

SNM'S MAILING ADDRESS: _____

Next I want to confirm which documents you'll be able to send before the interview. I'd like to get these documents at least three days before the interview, which is [Date]. That way I can review everything and tailor some of the questions I'll have for you. Which of these documents will you be able to share? [LIST ONLY ITEMS TO BE REQUESTED FROM EACH RESPONDENT.]

- Audited and unaudited revenue and expenditure statements for your SFA from fiscal year 2016–2017, or if those are not available, audited and unaudited revenue and expenditure statements from fiscal year 2015–2016.
- Completed daily production records that document the foods that are prepared for and served in reimbursable meals each day for a typical school week for [FILL SCHOOLS].
- Documentation that identifies the cost categories and support functions included in the district's indirect cost rates or indirect cost allocation plan(s), such as documentation submitted to the State Department of Education for approval.

[IF NEEDED: *Cost categories* that may be treated as indirect costs can include the following: salaries and wages; employee benefits and payroll taxes; workers' compensation; supplies and expendable equipment; equipment rental; gas, oil, or electricity; water or sewer; telephone or internet service; insurance such as liability, vehicle, or other insurance; or other purchased services. *Support functions* that may be treated as indirect costs can include: accounting, budget finance, and payroll; data processing operations and programming; administration of personnel, benefits, and human resources; purchasing and contracting; general administration and policy, such as the superintendent's office; school board; custodial and janitorial services; building operations and maintenance; equipment and vehicle operations and maintenance; refuse

disposal, pest control, or other sanitation; security; storage and transportation of goods; providing and maintaining uniforms; or medical or health services or supplies.]

- If applicable, your SFA's cycle menu(s)
- If applicable, your SFA's food service management company contract.
- If applicable, your SFA's food service employee union contract.
- One example record per supplier for food purchases from vendors, USDA Foods, and DoD Fresh that show the item, the unit size, the price per unit, and the quantity. These could be invoices, delivery slips, or monthly vendor statements.
- Examples of standardized recipes for foods prepared from scratch.
- Examples of records for district personnel or personnel in [FILL SCHOOLS] who work on food service activities and are paid out of the food service account. These records should show job title, salary, hours worked, amount of leave time, and amount of time spent on food service activities. Please redact any names, Social Security Numbers, or other personally identifiable information from these records.
- Examples of records for district personnel or personnel in [FILL SCHOOLS] who work on food service activities but are paid out of the district account rather than the food service account. These records should show job title, salary, hours worked, amount of leave time, and amount of time spent on food service activities. Please redact any names, Social Security Numbers, or other personally identifiable information from these records.
- If applicable, examples of records of non-reimbursable foods sales (for example, adult meals or items that are sold a la carte in the cafeteria or elsewhere in school, such as in vending machines, school stores, food carts, or snack bars).

What is the most convenient way for you to share the documents with me? Would you prefer to post the documents to a secure website, email them to me, fax them to me, or ship them postage-paid via FedEx?

- | | |
|-------------------------------------|--------------------------------|
| <input type="checkbox"/> SharePoint | <input type="checkbox"/> Fax |
| <input type="checkbox"/> Email | <input type="checkbox"/> FedEx |

Great. You can post/send the documents by [PROVIDE INSTRUCTIONS]. I will include these instructions in the meeting invitation, too.

Thank you for your help today. I look forward to speaking with you again soon.