

C11. RECRUITING CALL SCRIPT (GROUPS 2, 3, & FULL AND LIMITED OUTLYING AREAS)

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SUGGESTED TEXT — FIRST CALL TO SFA DIRECTOR (GROUPS 2, 3, & FULL AND LIMITED OA)

Hello, my name is _____. I'm calling on behalf of the U.S. Department of Agriculture (USDA), Food and Nutrition Service (FNS), to follow up on a letter sent to [SFA DIRECTOR /FSMC MANAGER NAME] (and your district) about the (GROUP 2 & 3: School Nutrition and Meal Cost Study-II (SNMCS-II); OA: Outlying Areas Cost Study). Could I speak to [SFA DIRECTOR NAME/FSMC MANAGER]?

IF NOT SFA DIRECTOR/FSMC MANAGER/UNAVAILABLE: And your name again? When is the best time to call [SFA DIRECTOR/FSMC MANAGER NAME]? Is there an assistant (SFA director/manager) I can speak with about the study? _____. Thank you _____ for your help, and please let [SFA DIRECTOR/FSMC MANAGER NAME] know I called!

IF SPEAKING TO THE SFA DIRECTOR/FSMC MANAGER: I am following up on a letter sent to you and your district on [DATE] regarding the (OA: Outlying Area Cost Study, a sub-study of the) School Nutrition and Meal Cost Study-II (SNMCS-II). The letter advised you that a member of the study team would be following up with your office to provide more information and to coordinate (your district's) participation in the study. Do you recall this letter?

IF YES, RECALLS LETTER: As you know... GO TO "MORE DETAIL"

IF NO, SFA DOESN'T HAVE THE LETTER: Could I confirm your email? I can send you a copy of the letter and tell you more about the study. [IF NOT RECEIVED, SEND AND TRY TO CONTINUE BY GOING TO "MORE DETAIL" OTHERWISE TAKE DATE AND TIME FOR CALLBACK.]

[GROUP 2 & 3] MORE DETAIL: FNS has contracted with Mathematica Policy Research, and its research partners Insight Policy Research, Decision Information Resources, and Agralytica to conduct the School Nutrition and Meal Cost Study-II (SNMCS-II) for school year 2019–2020. This important study will (1) describe the food and nutritional quality of school meals and afterschool snacks, (2) update information on the school food environment and food service policies and practices, (3) estimate the cost to produce school meals and snacks, and (4) collect information about student participation, satisfaction, and dietary intake. Having updated information about the school meals programs will help States, SFAs, and schools better serve students.

[FULL AND LIMITED OA] MORE DETAIL: FNS has contracted with Mathematica Policy Research, and its research partners Insight Policy Research and Agralytica to conduct the Outlying Area Cost Study for school year 2019–2020. This is a sub-study of the School Nutrition and Meal Cost Study-II (SNMCS-II). This important study will determine the cost of producing reimbursable meals for the National School Lunch Program and School Breakfast Program, including indirect and local administrative costs. It will also examine the ratios of revenues to costs. 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 such as [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands]. Findings from the study could eventually be used to adjust per-meal reimbursement rates in [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands].

IF TOLD THAT THE SFA IS MANAGED BY AN FSMC: Which food service management company is this and what is their role in food service in your SFA? Who is authorized to make a decision about your district’s participation in the study?

- **IF THE FSMC HAS ALREADY ENDORSED PARTICIPATION:** [FSMC name] has already approved your district’s participation in the study. I can forward you the email where [FSMC’s executive name] endorsed the study. Would you like me to do this?

ARRANGE TIME FOR NEXT CALL AFTER SFA DIRECTOR HAS CONFIRMED APPROVAL AND END THE CALL.

- **IF APPROVAL FROM FSMC’S EXECUTIVES IS REQUIRED:** Could you please provide us with a contact in your central offices that we can follow-up with to acquire approval for participation in the study?
 - To make the process as seamless as possible, we would like for someone from your district to connect us with the appropriate person at the FSMC so that we can explain the study in more detail and ask for their endorsement. Let me tell you a little bit more about the study and the data collection we’re doing.

GO TO APPROPRIATE TALKING POINTS.

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TALKING POINTS FOR SFA DIRECTOR (GROUP 2)

Mathematica is selecting a nationally representative sample of about 500 school districts nationwide and 3 to 4 schools per district. Data collection activities will be limited to only those necessary for success of the study. Your SFA's participation will focus on student nutrition, student meal program participation, and the school environment. You will *not* be asked to participate in the extensive cost and revenue portions of the study. During school year 2019–2020, your SFA and schools will be asked to:

- **Complete a Menu Survey.** This web-based survey will collect detailed information on the foods offered and served in each sampled school during a target week, as well as a la carte foods offered on a single day. The Menu Survey includes a questionnaire about foodservice operations that the school nutrition manager completes. The burden for the basic menu survey is 8 hours, with the incentive of \$100 (\$75 for filling out the Menu Survey, and \$25 for answering follow-up questions from the technical assistants). Burden includes required training time.
- **SFA Director and Principal Surveys.** SFA directors and sampled principals will be asked to respond to questions in web-based surveys needed to characterize district policies and the school environment. The SFA Director survey will take approximately 50 minutes to complete; the principal survey will take approximately 30 minutes to complete.
- **Student and Parent Interviews.** Professional data collectors will interview a small sample of students and their parents to obtain information on student characteristics, dietary intake, and consumption of and satisfaction with school meals. Students' height and weight will be measured as part of the interview. Data collection activities will differ for elementary school students and those in middle and high schools and have been designed to be age appropriate. The interview, which includes a 24-hour dietary recall will take about 60 minutes of the parent and child's time. Elementary students will be provided with a \$5 gift card to thank them for their participation; middle/high school students with a \$15 gift card (\$20 gift card if interviewed on a Saturday); elementary student parents will receive \$25 gift card as a token of our appreciation; middle/high school parents \$15 gift card. The parents of elementary students will receive a higher payment because they will need to assist their children with the 24-hour recall. Kindergarten and prekindergarten students will not be included in the study.
- **Observations of Cafeteria and Other Sources of Foods and Beverages.** Data collectors will observe one lunch and one breakfast period (if the school participates in the School Breakfast Program) in each sampled school to document characteristics of foodservice operations. They will also observe other sources of foods and beverages such as vending machines and school stores.
- **Passive/Active Consent.** This study is approved to use the passive consent process, whereby consent forms are sent home to student and parent participants and they sign and return the forms only if they wish to OPT OUT of the study. If they do not return a signed form, we assume they give their consent to participate.
- **Study Liaison.** To help coordinate the details of data collection in schools, we will ask that each principal designate a liaison. The liaison will be the primary point of contact for the study team to plan and conduct on-site data collection, including facilitating the distribution of study materials to selected students and their parents.

OBTAINING STUDY APPROVAL (MOU/RA)

We want to make sure we get the appropriate approvals for your district to participate in the study. We sent a letter informing you and [SUPERINTENDENT NAME] about the study. Is [SUPERINTENDENT NAME] the best person to contact for district approval?

IF NOT THE RIGHT PERSON/RESEARCH APPLICATION (RA) NEEDED: [OBTAIN NAME, TITLE, EMAIL and PHONE #]

- Do you know how the approval process works?

IF HE/SHE KNOWS ABOUT THE APPROVAL PROCESS

- What are the steps in the process?
- How long do you anticipate it will take to get approval?
- What can we do to facilitate the process?
- Can you assist us in facilitating the process?

[IF RESEARCH APPROVAL IS NEEDED, INFORM THE TEAM LEADERS AND DOCUMENT IN RECRUITMENT DATABASE]

INCENTIVES

We will be offering incentives to school staff for their help with the study. I would like to take a moment to discuss any restrictions your school district may have with staff receiving incentives.

- Can we mention study incentives to the schools when the study team contacts them? If no, can you please outline what the restrictions are regarding mentioning study incentives to the schools?

Planned Incentive Payments for School Staff

| Staff Member | Activity | Check Amount |
|--------------------------|--------------------------------------|---------------------------------|
| School Nutrition Manager | Menu Survey completion | \$75 |
| School Nutrition Manager | Menu Survey data retrieval | \$25 |
| Group 2 School Liaison | Parent consent facilitation | \$30 (passive) or \$60 (active) |
| | On-site data collection coordination | \$35 |

Note: We will adhere to district or school policy if employees are prohibited from accepting incentives.

CONFIRMING IF SFA CONTRACTS WITH AN FSMC

IF FSMC UNKNOWN: Is your foodservice operation currently under the direction of a foodservice management company, or does your school district use a consulting company or independent consultant to help plan or manage foodservice operations? (IF YES: Which company do you work with?)

COLLECTING STUDENT ROSTERS FOR THE SAMPLED SCHOOLS

Once we confirm eligibility of your study schools, we will send you a data request form that you may complete with the student roster information. We will also send you instructions on how to upload the completed forms to a secure website. Are you able to provide student roster information, or should we work with someone else in the district for this request?

NEXT STEPS: CONFIRM POINTS OF CONTACT

So, you will be our point of contact for everything SFA related, and I'll contact Mr./Ms. _____ about obtaining approval for [DISTRICT NAME] to participate in the study. Would it be best to include you in that phone call?

IF THE SFA DIRECTOR WANTS TO BE INCLUDED IN A CONFERENCE CALL:

What day and times are good for you? I'll call the district office to set up the call with [SUPERINTENDENT NAME]/[ADMINISTRATOR NAME] during one of the times you've mentioned and send you a confirmation. Would you prefer I notify you of the conference call date by email or phone?

END CALL: Thank you so much for your help, I will send you my contact information by email in case you have any questions after the call. [CONFIRM CONTACT EMAIL.] **IF PROMISING:** I would like to call you next week/in X days to obtain some information about your district (PLANNING INTERVIEW) that will be needed to determine school eligibility as well as general study planning purposes and MOU/Research Application process purposes. As the date of our first visit to the district approaches, a member of the data collection team will contact you to coordinate logistics.

SEND THANK YOU EMAIL (from study Inbox and save to district Outlook folder) **AFTER CALL AND UPDATE RECRUITMENT DATABASE. CALL DISTRICT TO GAIN STUDY APPROVAL AND START MOU PROCESS.**

TALKING POINTS FOR SFA DIRECTOR (GROUP 3)

Mathematica is selecting a nationally representative sample of about 500 school districts nationwide and 3 to 4 schools per district. Data collection activities will be limited to only those necessary for success of the study. Your SFA's participation will focus on student nutrition, student meal program participation, and the school environment. During school year 2019–2020, your SFA and schools will be asked to:

- **Complete a Menu Survey.** This web-based survey will collect detailed information on the foods offered and served in each sampled school during a target week, as well as a la carte foods offered on a single day. The Menu Survey includes a questionnaire about foodservice operations that the school nutrition manager completes. The burden for the menu survey is 10 hours, with the incentive of \$100 (\$75 for filling out the Menu Survey, and \$25 for answering follow-up questions from the technical assistants). Burden includes required training time.
- **SFA Director, School Nutrition Manager, and Principal Surveys.** SFA directors, school nutrition managers, and principals will be asked to respond to a web-based survey needed to characterize district policies, the school environment, and foodservice operations. The SFA Director survey takes about 40 minutes and the Principal Survey takes about 30 minutes. The School Nutrition Manager survey is included in the Menu Survey.
- **SFA Director, School Nutrition Manager, and Principal Cost Interviews.** SFA directors, school nutrition managers, and principals will be interviewed to gather information about the full cost of food service, including indirect and administrative costs. The SFA Director Cost Interview takes about 3 hours and 15 minutes, the Principal Cost Interview takes about 45 minutes, and the School Nutrition Manager Cost Interview takes about 1 hour and 30 minutes.
- **Cafeteria Observations.** Data collectors will observe one lunch and one breakfast period (if the school participates in the School Breakfast Program) in selected schools to document characteristics of foodservice operations.
- **Plate Waste Observations.** At a subset of schools, data collectors will estimate the proportion of foods wasted by students in order to assess the nutrient and food group composition of foods wasted, and to assess the relationship between plate waste and characteristics of students, school food environments, and school foodservice operations.

TALKING POINTS FOR SFA DIRECTOR/FSMC MANAGER (OUTLYING AREAS)

Mathematica is selecting a sample of (SFAs and) schools needed to produce cost estimates for each outlying area. Data collection activities will be limited to only those necessary for success of the study. Your SFA's participation will focus on the cost of producing reimbursable meals for the National School Lunch Program and School Breakfast Program. During school year 2019–2020, your SFA (FULL OA: and schools) will be asked to:

[FULL OA:

- **Complete a Menu Survey.** This web-based or hard-copy survey will collect detailed information on the foods offered and served in each sampled school during a target week. The Menu Survey can take about 8 hours to complete, including training time. School nutrition managers (and FSMC regional operations managers) will be offered \$75 for (assisting SNMs with) filling out the Menu Survey and \$25 for answering follow-up questions to make sure we get complete information.
- **SFA Director, School Nutrition Manager, and Principal Cost Interviews.** SFA directors, (the Guam FSMC manager,) school nutrition managers, and principals will be interviewed to gather information about the full cost of food service, including indirect and administrative costs. The SFA Director Cost Interview takes about 3 hours and 15 minutes (and will also be administered to the Guam FSMC manager). The Principal Cost Interview takes about 45 minutes, and the School Nutrition Manager Cost Interview takes about 1 hour and 30 minutes. (FSMC regional operations managers will also be asked to participate in the cost interviews with the school nutrition manager.)]

[LIMITED OA:

- **Complete a Menu Survey.** This hard copy survey will collect detailed information on the foods offered and served in reimbursable lunches and breakfasts (FILL MENU REQUEST DETAILS INCLUDING BURDEN TIME).
- **SFA Director Cost Interviews.** SFA directors will be interviewed to gather information about the full cost of food service, including indirect and administrative costs. The SFA Director Cost Interview takes about (FILL BURDEN TIME).]

OBTAINING STUDY APPROVAL (MOU/RA)

We want to make sure we get the appropriate approvals for your district to participate in the study. We will not have any direct interaction with students. [IF PLATE WASTE: However, we will need to observe students’ trays.] We sent a letter informing you and [SUPERINTENDENT NAME] about the study. Is [SUPERINTENDENT NAME] the best person to contact for district approval?

IF NOT THE RIGHT PERSON/RESEARCH APPLICATION (RA) NEEDED: [OBTAIN NAME, TITLE, EMAIL and PHONE #]

- Do you know how the approval process works?

IF HE/SHE KNOWS ABOUT THE APPROVAL PROCESS

- What are the steps in the process?
- How long do you anticipate it will take to get approval?
- What can we do to facilitate the process?
- Can you assist us in facilitating the process?

[IF RESEARCH APPROVAL IS NEEDED, INFORM THE TEAM LEADERS AND DOCUMENT IN RECRUITMENT DATABASE]

INCENTIVES (GROUPS 2, 3, AND FULL OA)

We will be offering incentives to school staff for their help with the study. I would like to take a moment to discuss any restrictions your school district may have with staff receiving incentives.

- Can we mention study incentives to the schools when the study team contacts them? If no, can you please outline what the restrictions are regarding mentioning study incentives to the schools?

Planned Incentive Payments for School Staff

| Staff Member | Activity | Check Amount |
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| School Nutrition Manager | Menu Survey completion | \$75 |
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Note: We will adhere to district or school policy if employees are prohibited from accepting incentives.

NEXT STEPS: CONFIRM POINTS OF CONTACT

So, you will be our point of contact for everything SFA related, and I’ll contact Mr./Ms. _____ about obtaining approval for [DISTRICT NAME] to participate in the study. Would it be best to include you in that phone call?

IF THE SFA DIRECTOR WANTS TO BE INCLUDED IN A CONFERENCE CALL:

What day and times are good for you? I'll call the district office to set up the call with [SUPERINTENDENT NAME]/[ADMINISTRATOR NAME] during one of the times you've mentioned and send you a confirmation. Would you prefer I notify you of the conference call date by email or phone?

END CALL: Thank you so much for your help, I will send you my contact information by email in case you have any questions after the call. [CONFIRM CONTACT EMAIL.] IF PROMISING: I would like to call you next week/in X days to obtain some information about your district (PLANNING INTERVIEW) that will be needed (GROUPS 2, 3, FULL OA: to determine school eligibility as well as) for general study planning purposes and MOU/Research Application process purposes. As (GROUP 3: the date of our first visit to; FULL AND LIMITED OA: our data collection with) the district approaches, a member of the data collection team will contact you to coordinate logistics.

SEND THANK YOU EMAIL (from study Inbox and save to district Outlook folder) AFTER CALL AND UPDATE IN RECRUITMENT DATABASE. CALL DISTRICT TO GAIN STUDY APPROVAL AND START MOU PROCESS.

SUGGESTED TEXT — FIRST CALL TO SUPERINTENDENT (GROUPS 2, 3 & OA)

Hello, my name is _____. I'm calling on behalf of the U.S. Department of Agriculture (USDA), Food and Nutrition Service (FNS), to follow up on a letter sent to [SUPERINTENDENT NAME] and your district about the (GROUPS 2, 3: School Nutrition and Meal Cost Study-II (SNMCS-II); OA: Outlying Areas Cost Study). Could I speak to [SUPERINTENDENT NAME]?

IF NOT SUPERINTENDENT/SUPERINTENDENT UNAVAILABLE: And your name again? When is the best time to call [SUPERINTENDENT NAME]? Is there an assistant Superintendent I can speak with about the study? _____. Thank you _____ for your help, and please let [SUPERINTENDENT NAME] know I called!

[GROUPS 2 & 3] MORE DETAILS: FNS has contracted with Mathematica Policy Research, and its research partners Insight Policy Research, Decision Information Resources, and Agralytica to conduct the School Nutrition and Meal Cost Study-II (SNMCS-II) for school year 2019–2020. This important study will (1) describe the food and nutritional quality of school meals and afterschool snacks, (2) update information on the school food environment and food service policies and practices, (3) estimate the cost to produce school meals and snacks, and (4) collect information about student participation, satisfaction, and dietary intake. Having updated information about the school meals programs will help States, SFAs, and schools better serve students.

[OA] MORE DETAIL: FNS has contracted with Mathematica Policy Research, and its research partners Insight Policy Research and Agralytica to conduct the Outlying Area Cost Study for school year 2019–2020. This is a sub-study of the School Nutrition and Meal Cost Study-II (SNMCS-II). This important study will determine the cost of producing reimbursable meals for the National School Lunch Program and School Breakfast Program, including indirect and local administrative costs. It will also examine the ratios of revenues to costs. 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. [FULL OA: (That); LIMITED OA: (A similar)] cost study methodology has never been applied in outlying areas such as [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands]. Findings from the study could eventually be used to adjust per-meal reimbursement rates in [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands].

I spoke with [SFA DIRECTOR NAME] about participation and need to speak with [SUPERINTENDENT NAME] regarding the district's approval process.

IF SPEAKING TO SUPERINTENDENT: I am following up on a letter sent to you and your district on [DATE] regarding (OA: the Outlying Area Cost Study, a sub-study of) the School Nutrition and Meal Cost Study-II (SNMCS-II). The letter advised you that a member of the study team would be following up with your office to provide more information and to coordinate your district's participation in the study. Do you recall this letter?

IF YES, RECALLS LETTER: As you know from the letter, the USDA/FNS has contracted with Mathematica Policy Research to conduct the (GROUPS 2, 3: SNMCS-II; OA: Outlying Areas Cost Study) for school year 2019–2020, and your school district has been selected to participate. GO TO OBTAINING STUDY APPROVAL (MOU/RA).

IF SUPERINTENDENT DOESN'T HAVE THE LETTER: Could I have/confirm your email? I can send you a copy and tell you about the study/call again later. [SEND AND TRY TO CONTINUE/SEND AND SET CALLBACK] When can I call you back? [DATE and TIME]

OBTAINING STUDY APPROVAL:

We want to make sure we get the appropriate approvals for your district to participate in the study [IF GROUP 2: because the study will ask for lists of students and contact information to mail letters to households.] [IF GROUP 3: because we will be visiting schools and conducting cafeteria observations and talking with school staff like principals and school nutrition managers. We will not have any direct interaction with students. [IF PLATE WASTE]: However, we will need to observe students' trays.] [IF FULL OA: because we will be talking with school staff like principals and school nutrition managers. We will not have any interaction with students.] [SFA DIRECTOR NAME] has agreed to participate and has named you as the person to contact to obtain district approval in the form of a Memorandum of Understanding. Are you the correct contact for this approval?

IF NOT THE RIGHT PERSON/RESEARCH APPLICATION (RA) NEEDED: Who should I speak to about obtaining approval/RA? [OBTAIN NAME, TITLE, EMAIL and PHONE #.]

IF CORRECT CONTACT FOR APPROVAL PROCESS: I would like to send you the MOU we have prepared for participating districts describing the responsibilities of the study team and [DISTRICT NAME]. We can talk about it once you have reviewed it. **IF NOT MENTIONED DURING CONVERSATION ASK:**

- What are the steps in the approval process?
- How long do you anticipate it will take to get approval?
- What can we do to facilitate the process?

[IF DISTRICT REQUESTS A RESEARCH APPLICATION (RA) OR OTHER DOCUMENTATION, ASK IF THE MOU CAN BE REVISED TO TAKE THE PLACE OF THE RA. IF IT CANNOT, OBTAIN COPY OF RA AND SUBMISSION REQUIREMENTS. INFORM THE TEAM LEADERS ABOUT THIS REQUIREMENT AND DOCUMENT ON TRACKING SPREADSHEET]

END CALL: Thank you so much for your help, I will send you my contact information by email in case you have any questions after the call, and I will send you the [DISTRICT NAME] MOU shortly. [CONFIRM CONTACT EMAIL].

SEND THANK YOU EMAIL AFTER CALL AND UPDATE TRACKING SPREADSHEET

- Recruiter customizes the MOU draft and sends to the district for review. The purpose of sharing the draft is to make sure everyone is in agreement and the MOU is approved. [NAME OF CONTRACTS PERSON] will sign the MOU that we send to the district.
- If no changes are needed, save the double signed MOU to the MOU folder on Mathematica's SharePoint site as MPRID_DISTRICT_FINALMOU_DATE and email the team.
- Recruiter follows up as needed.
- Recruiter sends final version (pdf) of the MOU to the district. Enter the date the countersigned MOU was received in the recruitment database.

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