

APPENDIX C13. RECRUITING CALL SCRIPT (GROUPS 1A, 1B, 2A, 2B, 3, & FULL AND LIMITED
OUTLYING AREAS)



OMB Number: 0584-0698

Expiration Date: 06/30/2027

This information is being collected to assist the Food and Nutrition Service in understanding school food purchasing practices, the nutritional quality of school meals and snacks, the cost to produce school meals, and student participation and dietary intakes. This is a mandatory collection and FNS will use the information to monitor program operations. This collection does not request any personally identifiable information under the Privacy Act of 1974. 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 0584-0698. The time required to complete this information collection is estimated to average 0.50 hours 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. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support, 1320 Braddock Place, 5th Floor, Alexandria, VA 22314 ATTN: PRA (0584-0698). Do not return the completed form to this address.

SUGGESTED TEXT — CALL TO SFA DIRECTOR (GROUPS 1A, 1B, 2A, 2B 3, & FULL AND LIMITED OA; CERTAINTIES ELIGIBLE FOR 1A, 2A, 3)

Hello, my name is _____. I'm calling from [FIRM] 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 2024-2025 National School Foods 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 or are you able to help with this 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 National School Foods Study. 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—and that's me! 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'd love to 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 1A, 2B, 2A, 2B & 3] MORE DETAIL: FNS has contracted with Mathematica, and its research partners Decision Information Resources and ProTeam to conduct the National School Foods Study for school year 2024–2025. This important study will (1) describe the food and nutrient content and overall 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. This important study will collect updated information from States, School Food Authorities, schools, parents, and children on the school meal programs. These data have not been collected in over 10 years and is critical to informing current and future program and policy decisions, affecting your schools and student lunches. With better data comes better policy; we seek to collect data to fully understand the school food environment.

[FULL AND LIMITED OA] MORE DETAIL: FNS has selected Mathematica, and its research partner Decision Information Resources (DIR) to conduct the National School Foods Study for school year 2024–2025, which includes [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands]. 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 and the ratios of revenues to costs. This study is important because an accurate assessment of meal costs could eventually be used to adjust per-meal reimbursement rates in [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands].

MORE DETAILS, IF NEEDED: 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. The methodology has never been applied in outlying areas such as [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands]. The 2024-2025 National School Foods Study will provide critical information to FNS about the cost of producing school meals 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 decide [DISTRICT NAME]'s participation in the study?

- **IF THE FSMC HAS ALREADY ENDORSED PARTICIPATION:** [FSMC name] has already approved [DISTRICT NAME]'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?
- **IF APPROVAL FROM FSMC'S EXECUTIVES IS REQUIRED:** We'd love for you to please provide us with a contact in your central office so that we can follow-up with to acquire approval for participation in the study. Do you have their name and contact information on hand?
 - To make the process as seamless as possible, we would like for someone from your district to connect us with your FSMC contact 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

Mathematica is selecting a nationally representative sample of more than 1,000 school districts nationwide [**GROUP 2a, 2b, 3:** and 2 to 4 schools per district]. Data collection activities will be limited to only those necessary for success of the study.

GROUPS 2a, 2b, & 3: Your SFA's participation will focus on student nutrition, student meal program participation, and the school environment. [**GROUP 2a & 2b:** You will *not* be asked to participate in the extensive cost and revenue portions of the study].

OUTLYING AREAS: 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 2024–2025, your SFA (FULL OA: and schools) will be asked to complete:

During school year 2024–2025, your SFA [GROUPS 2a, 2b, 3 & FULL OA: and schools] will be asked to complete:

[Table will be edited so only data collection activities and incentives relevant to the SFA being contacted are shown]

Instrument		Admin	Respondent	Group(s)	Time	Incentive
SFA Director Survey	This survey will ask about district policies, the school environment, and food service operations.	Web survey	SFA Director	1a	1.5 hours	\$75
				1b	1.25 hours	\$60
				1c, 2a, 3	45 minutes	\$35
				2b	20 minutes	\$25
Quarterly Food Purchase Data		Electronic Submittal	SFA Director	1a, 1b	6 hours	\$275
Quarterly Program Data Form		Web	SFA director	1a, 1b	15 mins	n/a
SNM Survey	This survey will ask about district policies, the school environment, and food service operations.	Web	School Nutrition Managers (SNMs)	2a, 3	20 MINS	N/A
				2b	20 minutes	N/a
Principal Survey	This survey will ask about district policies, the school environment, and food service	Web	Principals	2a, 3	30 minutes	n/a

Instrument		Admin	Respondent	Group(s)	Time	Incentive
	operations.					
Observation Guide	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	On-site observation	Schools (SNMs)	2a, 3	20 minutes	N/a
				2b	20 minutes	n/a
Menu Survey	This 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.	Web	SNMs	2a, 3, FOA	9 hours	\$225 (\$75 pre-pay/\$150 post pay)
		In person		2b	30 minutes	n/a
SFA On-site Cost Interview	This interview is to gather information about the full cost of food service, including indirect and administrative costs.	In-person	SFA directors/business managers	3, FOA, LOA	3.25 hours	\$150
SFA Follow-up Web Survey		Web	SFA directors	3, FOA	30 minutes	n/a
SFA Follow-up Cost Interview	This interview is to gather information about the full cost of food service, including indirect and administrative costs.	Telephone plus screen sharing	SFA directors/business managers	3, FOA	2 hours	\$90
SNM Cost Interview	This interview is to gather information	In person	SNMs	3	90 mins	\$50

Instrument		Admin	Respondent	Group(s)	Time	Incentive
	about the full cost of food service, including indirect and administrative costs.					
Principal Cost Interview	This interview is to gather information about the full cost of food service, including indirect and administrative costs.	In person	Principals	3, FOA	45 mins	\$40
On-Site Self-Serve/Made-to-Order Bar Form		On-site observation	Schools	3	10 mins	n/a
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.	On-site observation	Lunch & Breakfast trays (SNMs)	3 (subsample)	10 mins	n/a
AMPM (24-Hour Dietary Recall)		Field staff administer during target week alongside the student interview with a telephone	Students	2a, 2b	45	

Instrument		Admin	Respondent	Group(s)	Time	Incentive
		e follow-up				
Student Interview with AMPM (24-Hour Dietary Recall)	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. Data collection activities will differ for elementary school students and those in middle and high schools and have been designed to be age appropriate. Kindergarten and prekindergarten students will not be included in the study.	In person	Students	2a, 2b	12 minutes	Elementary - \$5 Middle/High School - \$15
Parent Interview	See student interview description The parents of elementary students will receive a higher payment because they will need to assist their children with the 24-hour recall.	Web or telephone	Parents	2a	25 minutes	Parent of Elementary student - \$25 Parent of Middle/High School - \$15
Reimbursa	SNMs will provide POS	Field	SNM	2a, 2b	10	n/a

Instrument		Admin	Respondent	Group(s)	Time	Incentive
ble Meal Sale Data Request Form	report or complete hard-copy form to indicate whether sampled students obtained a reimbursable breakfast and/or lunch on the day referenced in the 24-hour recall.	staff gather this during school visit			minutes	

GROUP 2a & 2B: Additional Talking points for Student interviews:

- **Study Liaison.** To help coordinate the details of data collection in schools, each principal should 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. To thank them for their time, liaisons are eligible to receive [INCENTIVE AMOUNT] pending district policies.
- **Collecting Student Rosters for 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?
- **Passive/Active Consent.** DESCRIBE PASSIVE CONSENT PROCESS: 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. [IF DISTRICT DOES NOT ALLOW PASSIVE CONSENT, LET THEM KNOW WE CAN USE ACTIVE CONSENT PROCESS.]

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 [Review data collection table for incentives by recruitment group, these are proposed to be paid to SFAs, SNMs and Principals].

- 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?

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

BENEFITS/RISKS FOR STUDY PARTICIPANTS

There are no known benefits to taking part in this study. Individual respondents may feel uncomfortable answering some questions and can choose not to answer any question. The data collected in this study will not be used to affect meal reimbursements to participating schools or school meal program benefits of participating households.

If you have any questions about your rights as a research participant, you may contact HML IRB at 202-246-8504.

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 YES: Can you assist us in facilitating the process or should we reach out to the Superintendent directly? 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]

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?)

START COLLECTING BASIC SFA PLANNING INFORMATION, IF POSSIBLE

NEXT STEPS: CONFIRM POINTS OF CONTACT

So, you will be our point of contact for everything SFA related, and I'll contact [SUPERINTENDENT NAME]/[ADMINISTRATOR NAME] 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 calendar invite for confirmation. Would you prefer I notify you of the conference call date by email or phone before sending the calendar invitation?

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 more 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 (cc study Inbox and save) AFTER CALL AND UPDATE IN RECRUITMENT DATABASE. CALL DISTRICT USING "CALL TO SUPERINTENDENT" SCRIPT NEXT PAGE TO GAIN STUDY APPROVAL AND START MOU PROCESS.

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

IF SFA STATES WE NEED TO CONTACT THE SUPERINTENDENT FOR APPROVAL / IF SFA UNRESPONSIVE, MENTION (phone message/email) THE IMPORTANCE OF THE STUDY AND THAT NEXT STEP IS A FOLLOW UP CALL TO THE SUPERINTENDENT'S OFFICE REGARDING THE CORRESPONDENCE SENT TO THE DISTRICT.

Hello, my name is _____. I'm calling from [FIRM] 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 2024-2025 National School Foods 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, and its research partners Decision Information Resources and ProTeam to conduct the National School Foods Study for school year 2024–2025. This important study will (1) describe the food and nutrient content and overall 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. This important study will collect updated information from States, School Food Authorities, schools, parents, and children on the school meal programs. These data have not been collected in over 10 years and is critical to informing current and future program and policy decisions, affecting your schools and student lunches. **[OA] MORE DETAILS:** FNS has contracted with Mathematica, and its research partners Decision Information Resources and ProTeam to conduct the National School Foods Study for school year 2024–2025. 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. The methodology has never been applied in [Alaska/Guam/Hawaii/Puerto Rico/the U.S. Virgin Islands]. This study is important because an accurate assessment of meal costs could eventually be used to adjust per-meal reimbursement rates in your [State/Territory].

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 on [DATE] about the 2024-2025 National School Foods Study. The letter advised you that a member of the study team would be following up to provide more information and to coordinate your district's participation in the study. Did you have a chance to review this letter?

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

USDA FNS has contracted with Mathematica to conduct the National School Foods Study for school year 2024–2025, and your school district has been selected to participate. GO TO OBTAINING STUDY APPROVAL (MOU/RA).

OBTAINING STUDY APPROVAL:

We want to make sure we get the appropriate approvals for your district to participate in the study [IF GROUP 2a or 2b: 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, or MOU. 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? [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 AN 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 RECRUITING TEAM LEADERS ABOUT THIS REQUIREMENT AND UPDATE THE RECRUITING DATABASE (RDB).]

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 RDB

- *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.*