

## Local Wellness Policy (LWP) Checklist

For Contracting Entities (CEs) Operating the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP)

Complete this form using the attached directions.

[Note: The directions provide detailed explanations of requirements and options.]

### Contracting Entity (CE) Information

CE Name:

CE Identification Number (CE ID):

Schools Operating Under the Local Wellness Policy (LWP):

### I. Structure

*Requirement: The CE must develop a LWP that applies to all NSLP and/or SBP schools. The LWP must be approved by the board of trustees or governing board.*

Check the boxes below to indicate that the CE has met each requirement.

- A. All schools operating NSLP and/or SBP
- B. Approval

*If the CE has not implemented a LWP in all schools operating NSLP and/or SBP and does not have board approval for its LWP, explain why in the space below.*

## II. Nutrition Education and Promotion

Requirement: The CE must address nutrition education and promotion in its LWP:

- Activities that foster student health, wellbeing, and ability to learn
- Nutritional guidelines for all food and beverages available to be sold or given to students on the school campus during the school day

Check each element that is addressed in the CE's local wellness plan.

- A. Activities to promote health, wellbeing, and students' ability to learn
- A.1 Physical activities
- For students       For parents
- For staff       For community members
- A.2 School-based activities
- For students       For parents
- For staff       For community members
- A.3 Community-based activities
- For students       For parents
- For staff       For community members
- B. Nutrition guidelines for all food and beverages available on school campuses during the school day
- B.1 Sold in schools
- To students       To adults
- B.2 Given away in schools
- To students       To adults
- C. Special Situations:

*(Including, but not limited to, food or beverages given or provided to a student by an adult acting on behalf of a student's parent or guardian or food or beverages delivered by businesses to students on the school campus)*

If the CE's LWP does not include nutrition education and promotion and nutrition guidelines in its LWP, provide an explanation for why the CE did not in the space below.

### III. Stakeholder Engagement

*Requirement: The CE must engage stakeholders in developing and implementing its LWP. Stakeholders must include, but are not limited to, the following groups:*

- Administrators, district and/or school
- Community members
- Parents
- Representatives of the CE or school(s)
- Representatives of the board of trustees or governing body
- School health professionals
- School nutrition staff
- Students

*Check each stakeholder group that will be or is involved in the development and implementation of the LWP.*

- A. Administrators, district and/or school
- B. Community members (local service organizations or other appropriate representatives)
- C. Parents
- D. Representatives of the CE or school(s)
- E. Representatives of the board of trustees or governing body
- F. School health professionals
- G. School nutrition staff
- H. Students
- I. Other

*If the CE did not involve stakeholders in developing and implementing its LWP (including those groups that are required to be involved), provide an explanation for why the CE did not in the space below.*

#### IV. Triennial Assessment and Publication of Assessment Results

*Requirement: Every three years, the CE (1) must measure the effectiveness of its LWP implementation and (2) must distribute the results of the assessment to the public.*

*The assessment must assist the CE in determining if the implementation of the LWP has achieved the following:*

- *If the CE and the schools are in compliance with the LWP*
- *If the CE's LWP aligns to model evidence-based strategies for LWP*
- *If the CE has made progress in attaining the goals described in its LWP*

*Check each element that is addressed in the CE's LWP.*

A. Triennial ( every three years) assessment

Record the frequency of assessment in the space below:

- A.1 Compliance with the CE's Written LWP
- A.2 Alignment to model evidence-based strategies for LWP
- A.3 Progress made toward attaining the goals described in LWP

B. Publication of assessment results

Record the date the CE last published the results of its assessment the LWP in the space below:

*If the CE does not include methods to assess its LWP and share the results of assessments with the public, provide an explanation for why the CE did not in the space below.*

#### V. Marketing at School Operating NSLP and /or SBP

*Requirement: The CE must describe (1) the current types and methods of marketing that will be allowed for foods and beverages sold on the school campus during the school day and (2) the process or strategies the CE will use to ensure that, as of July 1, 2017, all future marketing for food and beverages marketed and sold on the school campus during the school day meet the Competitive Food Nutrition Standards.*

*Check each element that is addressed in the CE's LWP.*

- A. Current marketing
- B. Future marketing

*If the CE has not addressed current and future marketing guidelines for foods and beverages sold to students in its LWP, provide an explanation for why the CE did not in the space below.*

## VI. Assigned Responsibilities

Requirement: CEs must assign a staff position or positions to be responsible for managing the following:

- Assessment of the LWP
- Development of the LWP
- Implementation of the LWP
- Update of the LWP

Check each statement that describes an action for which the CE has identified and assigned a specific person to be responsible for managing the implementation of the following:

- A. Development of LWP
- B. Implementation of LWP
- C. Assessment of LWP
- D. Update of LWP
- E. Other:

If the CE has not assigned responsibilities for ensuring that the LWP is developed, implemented, assessed, and updated as appropriate, provide an explanation for why the CE did not in the space below.

## VII. Records Retention

Requirement: The CE must retain documentation that demonstrates its compliance with the LWP requirements.

Check the statement that describes the action a CE has taken or will take to retain records related to its LWP.

- A. Establish a system for maintaining all required records.
- B. Establish a system to ensure that documentation is retained for the proper period of time.

If the CE does not have a system to retain records for the proper period of time, provide an explanation for why the CE did not in the space below.

## Directions: Local Wellness (LWP) Checklist

For Contracting Entities (CEs) Operating the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP)

### Purpose

Each CE must develop a LWP that meets the requirements described in this form and may adopt additional requirements as long as those requirements are not in conflict with federal, state, or local regulations.

The LWP **must** apply to all schools that operate NSLP/SBP. However, the CE **may** apply its LWP to schools that do not operate NSLP/SBP.

A CE may develop a LWP that is CE-wide, school specific, specific to a group of schools, or a combination of CE-wide and school specific or specific to a group of schools.

This checklist is intended to be used by CEs to ensure that the LWP meets all requirements and guide the CE in creating an implementation plan for its LWP. CEs are not required to submit this checklist or their LWPs to the Texas Department of Agriculture (TDA) unless requested to do so.

A LWP must include the following requirements:

1. Structure
2. Nutrition Education and Promotion
3. Stakeholder Engagement
4. Triennial Assessment
5. Marketing
6. Assigned Responsibilities
7. Records Retention

Use This Form	
<b>Frequency</b>	As needed.
<b>Required Form Format</b>	Not required.
<b>Record Retention</b>	Public and charter schools are required to keep documentation related to school nutrition programs for five years.  Private schools, other nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for three years.

### Directions:

#### *Contracting Entity (CE) Information*

**Contracting Entity (CE) Name:** Record the name of the CE in designated space.

**CE Identification Number (CE ID):** Record the CE ID number in the designated space.

**Schools Operating Under the Local Wellness Policy (LWP):** Record the names of the schools for which the LWP applies or indicate *all schools* in the designated space.

<p><b>I. Structure</b></p> <p><b>A. All schools operating NSLP and/or SBP</b> Check the box to indicate that the CE has developed a LWP that applies to all schools participating in NSLP and/or SBP.</p> <p><b>B. Approval.</b> Check the box to indicate that the CE has received board approval for its LWP.</p> <p>If the CE has not implemented a LWP in all schools operating NSLP and/or SBP and does not have board approval for its LWP, provide an explanation for why the CE did not in the text box provided.</p>	<p><b>Requirement</b></p> <p>The CE <u>must</u> develop a LWP that applies to all schools participating in NSLP and/or SBP.</p> <p>The LWP <u>must</u> be approved by the board of trustees or governing board.</p> <p>CEs <u>may</u> customize the policy for different schools based on student age, facility, or other circumstances as long as the resulting LWP does not conflict with federal and state regulations.</p>
<p><b>II. Nutrition Education and Promotion</b></p> <p><b>A. Student health, wellbeing, and students' ability to learn</b> Check the box for each activity type promoted in the LWP and check the box for each group that will be involved in the activity type.</p> <p><b>B. Nutrition Guidelines</b> Check the box to indicate if the LWP addresses food and beverages made available (sold and/or given away) on the school campus during the school day and indicate each group that is addressed in the LWP. This includes fundraisers, school-sponsored special events, and nonschool-sponsored special events that take place during the school day on the school campus.</p> <p><b>C. Special Situations</b> Provide a description of the element that has been added in the text box if Special Situation is checked.</p> <p>If the CE has not addressed nutrition education and promotion and nutritional guidelines in its LWP, provide an explanation for why the CE did not in the text box provided.</p>	<p><b>Requirement</b></p> <p>The CE <u>must</u> address nutrition education and promotion in its LWP: (1) activities that foster student health, wellbeing, and ability to learn and (2) nutritional guidelines for all food and beverages available to be sold or given to students on the school campus during the school day in its LWP.</p> <p>The LWP <u>must</u> target students but <u>may</u> also address the needs of parents, community members, and staff in nutrition education and promotion.</p>
<p><b>III. Stakeholder Engagement</b></p> <p>Check the box for each type of stakeholder group involved in the development and implementation of the LWP.</p> <p>If <u>Other</u> is checked, provide a description of the other type(s) of stakeholder(s) in the text box provided</p> <p>If the CE did not involve any of the required stakeholders in developing and implementing its LWP, provide an explanation for why the CE did not in the text box provided.</p>	<p><b>Requirement</b></p> <p>The CE <u>must</u> engage stakeholders in developing and implementing its LWP. Engaged stakeholders <u>must</u> include administrators (district and/or school), community members, parents, representatives of the CE or school(s), representatives of the board of trustees or governing body, school health professionals, school nutrition staff, and students.</p> <p>CEs <u>may</u> involve other stakeholder groups, including Supplement Assistance Program Education (SNAP-ED) coordinators.</p>

<p><b>IV. Triennial Assessment and Publication of Assessment Results</b></p> <p><b>A. Triennial (Every Three Years) Assessment</b></p> <p><i>Check the box if the CE has included a triennial assessment or more frequent assessment in its LWP.</i></p> <p><i>Record how often the CE assesses or will assess its LWP in the text box provided.</i></p> <p><i>Check the box for each statement that describes an aspect of the LWP that the assessment has or will explore.</i></p> <p><b>B. Publication of Assessment Results</b></p> <p><i>Check the box if the CE has published or will publish the assessment of its LWP and record the date the CE last published the results of an assessment of its LWP in the text box provided.</i></p> <p><i>If the CE (1) has not or will not measure the effectiveness of the implementation of its LWP and/or (2) has not or will not publish the results of its LWP assessment, provide an explanation for why the CE has not or will not in the text box provided.</i></p>	<p><b>Requirement</b></p> <p><i>At least <u>every three years</u> (triennium), the CE <u>must</u> assess the effectiveness of the implementation of its LWP including the following aspects of its implementation:</i></p> <ol style="list-style-type: none"> <li><i>1. compliance with its LWP</i></li> <li><i>2. alignment to model, evidence-based LWPs<sup>1</sup></i></li> <li><i>3. progress made toward attaining the goals described in its LWP</i></li> </ol> <p><i>The CE <u>must</u> distribute the results of the assessments to the public.</i></p> <p><i>The CE <u>may</u> assess the implementation of its LWP more frequently and <u>may</u> include other areas or issues in its assessment.</i></p>
<p><b>V. Marketing at Schools Operating NSLP and/or SBP</b></p> <p><b>A. Current marketing</b></p> <p><i>Check the box if the CE's LWP addresses current types and methods of marketing for foods and beverages sold to students.</i></p> <p><b>B. Future marketing</b></p> <p><i>Check the box if the CE's LWP describes strategies to ensure that future marketing for food and beverages sold to students is or will be limited to items that meet the Competitive Food Nutrition Standards.</i></p> <p><i>If the CE has not addressed current and future marketing guidelines for food and beverages sold to students in its LWP, provide an explanation for why the CE did not in the text box provided.</i></p>	<p><b>What is marketing?</b></p> <p><i>Strategies used to promote the sale of a food or beverage.</i></p> <p><b>What types or methods of marketing are covered in the requirements related to marketing?</b></p> <p><i>Includes, but is not limited to, oral, written, and graphic statements that appear on vending machines, posters, menu boards, tray liners, beverage cups, coolers, trash cans, food service supplies and equipment, digital marketing, or other items.</i></p> <p><b>When and where do the marketing standards apply?</b></p> <p><i>Marketing for any food or beverage sold on the school campus during the school day for those schools operating NSLP and/or SBP.</i></p> <p><b>When do the marketing standards not apply?</b></p> <p><i>Marketing standards do not apply to materials used for classroom educational purposes and for schools that do not operate NSLP and/or SBP.</i></p> <p><b>Requirement</b></p> <p><i>The CE <u>must</u> (1) describe its current marketing guidelines for foods and beverages sold to students in its LWP for those schools operating NSLP and/or SBP and (2) describe the process or strategies the CE will use to ensure that, as of July 1, 2017, all future marketing for foods and beverages sold to students on the school campus during the school day for these campuses meet the Competitive Food Nutrition Standards.</i></p> <p><i>CEs <u>are not required</u> to immediately replace items that display marketing information (including products with logos) that are not compliant with the Competitive Food Nutrition Standards.</i></p> <p><i><u>Instead</u>, CE <u>are required</u> to establish a plan that</i></p> <ul style="list-style-type: none"> <li><i>ensures that all items that display marketing information obtained after July 1, 2017 are compliant with the Competitive Food Nutrition Standards and</i></li> <li><i>eliminates all existing items that display marketing information that are not compliant with the competitive food regulations.</i></li> </ul>

<sup>1</sup> USDA provides resources on successful practices and best practices on the School Nutrition Environment and Wellness Resources website (<http://healthymeals.nal.usda.gov/school-wellness-resources-2>)

**VI. Assigned Responsibilities**

Check the box for each responsibility the CE has assigned to an individual.  
If Other is checked, provide a description of the responsibility that has been assigned in the text box provided.

If the CE has not assigned responsibilities for ensuring that the LWP is developed, implemented, assessed, and updated as appropriate, provide an explanation for why the CE did not in the text box provided.

**Requirement**

CEs must assign a staff position or positions to be responsible for the following tasks: development of the LWP, implementation of the LWP, assessment of the LWP, and update of the LWP.

The CE may assign one person to take responsibility for all tasks or may assign multiple people.

**VII. Records Retention**

Check the box for each statement that describes the CE's efforts to retain all required documentation.

If the CE does not have a system to retain records for the proper period of time, provide an explanation for why the CE did not in the text box provided.

**Requirement**

CEs must retain all records that demonstrate compliance with LWP requirements, including, but not limited to, stakeholder involvement, development, and implementation of the LWP, triennial assessments, public notifications, and marketing policy.

Public and charter schools are required to keep documentation related to school nutrition programs for five years.

Private schools, other nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for three years.