Section 25, Professional Standards

Section 25 Update Guide

April 3, 2018  Updated Section 25, Professional Standards to incorporate the following United States Department of Agriculture (USDA) memos and guidance:
- USDA Memo SP 38-2016, Questions & Answers (Q&As) on the Final Rule “Professional Standards for State and Local School Nutrition Program Personnel as Required by the Healthy, Hunger-Free Kids Act of 2010” (May 26, 2016)

Clarified information on the following topics:
- Compliance
- Content for training by job function and responsibility
- Food safety training requirements for directors
- Hiring standards for program directors
- Professional standards for contracted services and food service management companies (FSMCs)
- Training requirements for assistant directors, employees working less than 20 hours, local wellness coordinators, and staff with cognitive disabilities
- USDA Learning Categories

February 26, 2016  Updated Section 25, Professional Standards to incorporate the following United States Department of Agriculture (USDA) memos and guidance:
- Updated Professional Learning Objectives and Professional Standards learning Topics with Learning Topic Codes (September 11, 2015)

Clarified information on the following topics:
- Appropriate training topics
- Documentation
- Equivalent Educational Experience
- Flexibility for SY 2015-2016
- Food Service Management Company
- Program director and manager duties and responsibilities
- Related Field for hiring professional standards
- Relevant School Nutrition Program Experience
- Special situations related to training professional standards
- Staff with shared responsibilities
- Total enrollment
- Training provided by program directors and program managers
- Unacceptable training topics
- Updated learning categories, topics, subtopics, and objectives
May 18, 2015

Removed the content from Section 25 related to the history of the school nutrition program and replaced it with new content that provides guidance on the school nutrition program professional standards. The previous content on the history of the school nutrition program will be relocated to the SquareMeals website (www.squaremeals.org).

This section incorporates the following United States Department of Agriculture (USDA) guidance:

- Correction to Professional Standards for State and Local School Nutrition Programs Personnel as Required by the Healthy Hunger-Free Kids Act of 2010, Federal Register, Volume 80, Number 88 (May 7, 2015)
- Professional Standards for State and Local School Nutrition Programs Personnel as Required by the Healthy Hunger-Free Kids Act of 2010, Federal Register, Volume 79, Number 23 (February 4, 2015)
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CE Total Student Enrollment of 10,000 or More

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Contact Information for the
Texas Department of Agriculture (TDA), Food and Nutrition

When contacting TDA by phone, Contracting Entities (CEs) need to have their CE Identification Number (CE ID) (and site ID, if applicable). CEs should include their name and CE ID (and site name and ID if applicable) in all communication or documentation.

<table>
<thead>
<tr>
<th>General Contact Information</th>
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<tbody>
<tr>
<td><strong>Physical Address:</strong></td>
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<tr>
<td><strong>Mailing Address:</strong></td>
</tr>
<tr>
<td><strong>Phone:</strong></td>
</tr>
<tr>
<td><strong>Fax:</strong></td>
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<tr>
<td><strong>Email Contact:</strong></td>
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<tr>
<td><strong>Website:</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Contact for Issues Related to Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child &amp; Adult Care Food Program:</td>
</tr>
<tr>
<td>National School Lunch Program, School Breakfast Program, &amp; Special Milk Program:</td>
</tr>
<tr>
<td>Seamless Summer Option:</td>
</tr>
<tr>
<td>Summer Food Service Program:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Contact for Issues Related to Program Operation</th>
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</thead>
<tbody>
<tr>
<td>Commodity Operations:</td>
</tr>
<tr>
<td>Community Operations (Child &amp; Adult Care Food Program &amp; Summer Food Service Program):</td>
</tr>
<tr>
<td>Local Products:</td>
</tr>
<tr>
<td>Procurement, Including Sole Source:</td>
</tr>
<tr>
<td>TX-UNPS Direct Certification Direct Verification System:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Contact for CE Flexibility Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast Waiver:</td>
</tr>
<tr>
<td>Excessive Balance Plan:</td>
</tr>
<tr>
<td>Gender Exception:</td>
</tr>
<tr>
<td>Grains Exemption:</td>
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<tr>
<td>Milk Exemption:</td>
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<tr>
<td>Milk Substitute Notification:</td>
</tr>
<tr>
<td>Paid Lunch Equity (PLE) Exemption:</td>
</tr>
<tr>
<td>RCCI Age/Grade Group Meal Pattern Flexibility:</td>
</tr>
<tr>
<td>Seamless Summer Operation (SSO) Age/Grade Flexibility:</td>
</tr>
<tr>
<td>Child Nutrition Program Requirement Waiver:</td>
</tr>
<tr>
<td>Summer Mandate:</td>
</tr>
</tbody>
</table>
Professional Standards

The continuing education/training and hiring professional standards for the National School Lunch Program (NSLP) and School Breakfast Program (SBP) are intended to provide a framework to

- ensure that the personnel who manage and/or operate these programs have adequate knowledge and training to perform their duties,
- strengthen the ability of personnel to manage and/or operate the programs effectively and efficiently, and
- improve the quality of school meals, reduce errors, and enhance program integrity.

What is the effective date for the guidance in this section?
The guidance in this section takes effect July 1, 2015.

Who does this affect?
The guidance in this section applies to all personnel who manage and/or operate school nutrition programs (SNPs) as well as employees who are contracted to manage or operate an SNP on behalf of a contacting entity (CE). These requirements do not apply to the Special Milk Program.

What school nutrition programs (SNPs) are affected?
The requirements described in this section apply to CE operating the following SNPs:

- National School Lunch Program (NSLP)
  - Afterschool Care Program (ASCP)
  - Fresh Fruit and Vegetable Program (FFVP)
  - Seamless Summer Option (SSO)
- School Breakfast Program (SBP)

If a CE operates a site under the Child and Adult Care Food Program (CACFP) or Summer Food Service Program (SFSP) in addition to its NSLP or SBP sites, the professional standards for continuing education/training and hiring apply to these sites.
Summary of Professional Standards for School Nutrition Programs

The Summary of Professional Standards Chart in this section provides an overview of the key elements of the professional standards requirements.

<table>
<thead>
<tr>
<th>Summary of Professional Standards Chart</th>
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<tbody>
<tr>
<td>Types of Professional Standards</td>
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<tr>
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</tr>
<tr>
<td><strong>Continuing Education/Training Professional Standards</strong> (Training Standards) specify training hours and topics that are required based on employee responsibilities.</td>
</tr>
<tr>
<td><strong>Hiring Professional Standards for Program Directors</strong> (Hiring Standards) specify the required educational background and professional experience for the program director.</td>
</tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Hire/Employment</th>
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</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td><strong>All Employees Hired and Employed Before or After July 1, 2015</strong> must meet the training standards requirements each school year based on their job functions.</td>
</tr>
<tr>
<td><strong>Program Directors Hired and Employed Before or After July 1, 2015</strong> must meet the food safety training requirements every five years.</td>
</tr>
<tr>
<td><strong>Program Directors Whose Positions Were Not Advertised Prior to July 1, 2015 and Who Are Hired and Employed on or after July 1, 2015</strong> must meet the hiring standards requirements based on the total number of students enrolled in the CE’s school(s).</td>
</tr>
<tr>
<td>If the program director responsibilities are distributed across several positions, only the person hired to perform the majority of the program director duties must meet the program director hiring and training standards. If the program director and program manager positions are merged, the person performing the combined positions must fulfill the program director requirements.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Job Position Roles and Functions</th>
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<tr>
<td><strong>School Nutrition Program Directors</strong> are those individuals directly responsible for management of the day-to-day operations of school food service for all participating schools under the jurisdiction of the contracting entity (CE).</td>
</tr>
<tr>
<td>Program director responsibilities typically include, but are not limited to, administration, program implementation, monitoring, and evaluation of the following: sanitation, food safety, employee safety, nutrition and menu planning, food production, facility layout and design, equipment selection, procurement, financial management, recordkeeping, program accountability, marketing; customer service, nutrition education, general management, personnel management, and computer technology.</td>
</tr>
</tbody>
</table>
School Nutrition Program Managers are employees directly responsible for the management of the day-to-day operations of school food service for a participating school.¹

Other School Nutrition Program Employees are employees, without managerial responsibilities, involved in the day-to-day operations for the SNP whether they are or not funded with school nutrition program funds.²

Food Service Management Company (FSMC) Staff must meet the hiring and training standards for the position they are hired to perform. If an FSMC staff member performs the responsibilities of the program director, the person employed by the CE who is assigned to manage the FSMC contract and ensure that all regulations are met must also meet the hiring and training standards. This oversight includes requiring the FSMC to provide documentation that the FSMC has fully implemented the professional standards for continuing education/training and hiring.

Total Student Enrollment Level³ (Based on the most current October 1 Data)

<table>
<thead>
<tr>
<th>Smaller Sized Schools—2,499 students or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 500—500 students or less</td>
</tr>
<tr>
<td>Medium Sized Schools—2,500 to 9,999 students</td>
</tr>
<tr>
<td>Larger Sized Schools—10,000 students or more</td>
</tr>
</tbody>
</table>

Definitions for This Section
For this section, the following terms will be used:

<table>
<thead>
<tr>
<th>Continuing Education/Training</th>
<th>Events that provide information and build skills to improve school nutrition employee effectiveness and efficiency. This includes, but is not limited to, workshops, conferences, onsite training, webinars, and classroom style learning.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equivalent Educational Experience</td>
<td>College credits completed by an individual who does not possess a bachelor’s or an associate’s degree. To meet the hiring standards using this criterion, a new director for a school nutrition program would be expected to have a least 60 college credits (number of hours typically required for an associate’s degree).</td>
</tr>
<tr>
<td>Related Field</td>
<td>Other college majors that would provide an applicant specific knowledge and skills that are relevant for a school nutrition program director. Possible majors would include, but are not limited to, food science, community nutrition and marketing, and hospitality management.</td>
</tr>
</tbody>
</table>

¹ A school nutrition program manager, as defined in this section, may be the manager for more than one participating school, but not all of the participating schools.

² Staff classified as other school nutrition program employees as defined in this section may work in more than one participating school.

³ CEs must retain documentation demonstrating total student enrollment for the CE. See the Records Retention subsection in this section for additional information.
| **Relevant School Nutrition Program Experience** | Experience in the NSLP and SBP, as well as experience in other child nutrition programs (Child and Adult Care Food Program and/or Summer Food Service Program) if the latter experience is gained from working in a school. The rationale for hiring actions based on an applicant’s work experience must indicate the applicant’s familiarity with USDA’s school nutrition program. The intent of the professional standards regulations is to ensure that new school nutrition program directors have the knowledge and skills to manage the program as required. |
| **School Nutrition Program Directors (Program Directors)** | Those individuals who are directly responsible for the management of the day-to-day operations of school food service for all participating schools under the jurisdiction of the school food authority, including employees who are contracted to serve as the director for an SNP on behalf of the CE. Program director responsibilities typically include, but are not limited to, administration, program implementation, monitoring, and evaluation of the following: sanitation, food safety, employee safety, nutrition and menu planning, food production, facility layout and design, equipment selection, procurement, financial management, recordkeeping, program accountability, marketing; customer service, nutrition education, general management, personnel management, and computer technology. |
| **School Nutrition Program Managers (Program Managers)** | Those individuals who are directly responsible for the management of the day-to-day operations of school food service for a participating school including employees who are contracted to manage a SNP on behalf of the CE. A school nutrition program manager, as defined in this section, may be the manager for more than one participating school, but not all of the participating schools. |
| **Other School Nutrition Program Employees (Other Program Employees)** | Those individuals without managerial responsibilities who are involved in day-to-day operations of school food service for a participating school, including employees who are contracted to assist in the day-to-day operations of a SNP on behalf of the CE. Staff classified as other school nutrition program employees, as defined in this section, may work in more than one participating school. |
| **School Year (SY)** | For the professional standards requirements, the school year (SY) is defined as the program year—July 1 to June 30. |
| **Temporary, Substitute, or Acting Employee** | Individual who is temporarily filling an employee position.  
*For Example: A person who fills in temporarily for a day or few days for an employee who has a sudden illness or family emergency.* |
| **Total Enrollment** | Total number of students who are able to participate in a school nutrition program, i.e., total enrollment of all sites participating in any school nutrition program as applied to the hiring standards. CE’s should use the most current October enrollment data for this purpose. |
Continuing Education/Training Professional Standards
(Training Standards)
Training standards apply to all SNP staff starting July 1, 2015. Each employee must obtain the appropriate number of training hours based on job function(s) for each school year—July 1 to June 30. Program staff include, but are not limited to, cooks, cashiers, and others who are involved in the preparation and service of school meals; staff involved in other program operations such as eligibility determinations and meal counting and claiming; and support staff that have a job function that has an impact on the safety of school meals.

The professional standards requirements for each staff member are associated with the employee’s job function(s), not the local position title. If an individual performs the functions described for a position, but has a different title than the one used in the USDA professional standards, the requirements still apply to the person regardless of the position title.

Job Position Descriptions That Indicate Training Requirements
The following job position descriptions are used to determine the amount of training hours each employee is required to have each year:

School Nutrition Program Directors (Program Directors)
Employees who are directly responsible for the management of the day-to-day operations of school food service for all participating schools under the jurisdiction of the contracting entity, including employees who are contracted to serve as the director for a SNP on behalf of the CE.

Program director responsibilities typically include, but are not limited to, administration, program implementation, monitoring, and evaluation of the following: sanitation, food safety, employee safety, nutrition and menu planning, food production, facility layout and design, equipment selection, procurement, financial management, recordkeeping, program accountability, marketing, customer service, nutrition education, general management, personnel management, and computer technology.

School Nutrition Program Managers (Program Managers)
Employees who are directly responsible for the management of the day-to-day operations of school food service for a participating school including employees who are contracted to manage a SNP on behalf of the CE. A school nutrition program manager, as defined in this section, may be the manager for more than one participating school, but not all of the participating schools.

Other School Nutrition Program Employees (Other Program Employees)
Employees without managerial responsibilities who are involved in day-to-day operations of school food service for a participating school, including employees who are contracted to assist in the day-to-day operations of the program on
behalf of the CE. Staff classified as other school nutrition program employees, as defined in this section, may work in more than one participating school.

**Continuing Education/Training, Special Situations**

The following guidance will assist CEs in applying the professional standards in special situations.

**Assistant Director for SNP**

If the duties of the Assistant Director are comparable to those of a program manager, the assistant director must, at a minimum, complete the annual training required for a program manager. If the duties are not comparable, the assistant director must complete the annual training required for other program staff.

**Employees and Contracted Food Service Employees in Charter Schools with Locations in More Than One Geographic Area**

The job position descriptions and training hour requirements also apply to CEs that have participating sites that are managed and/or operated in different locations across the state even if a third party manages and/or operates those programs. In these cases, (1) a program director may be assigned to one site, a group of sites, or all sites; (2) a program manager may be assigned to one site or a group of sites, but cannot be the program manager for all sites.

**Employees with Multiple Functions/Positions**

For SNP employees who share program director and program manager roles and responsibilities, the CE must use the following guidance.

- If the person holds a position that encompasses more than one job position description, the person must meet the highest level of professional standards.

- If an employee serves more than one position in the same CE or multiple CEs as described in this section, the employee must meet the highest set of professional standards.

- If school nutrition program director duties are performed by the program manager, the manager is expected to meet the program director training professional standards.

- When a CE with less than 500 students or with only one site does not have a designated program director, the person who plans, administers, implements, monitors, and evaluates all aspects of the school nutrition program for the CE must meet the program director professional standards for training even if the person’s major responsibilities are not fulfilling the program director’s responsibilities.
Employees Working Under an Annual Contract
The duration of the contract does not affect the training requirements.

Funding Source for Employee Salary
The training standards apply to staff whose salaries are paid, partially paid, or not paid by the SNP.

General Training Not Related to SNP Operation
General training provided to SNP staff that does not address topics relevant to the operation of the SNP cannot be counted toward meeting the continuing education/training professional standards requirements.

This includes, but is not limited to, in-service training provided at the beginning of the school year or during the school year.

For Example: The following training topics are unlikely to be relevant to SNP operation as the content does not relate to the tasks the SNP staff must perform:
- Record keeping related to teacher gradebooks
- Integrating writing into all content areas
- Understanding the learning needs of diverse learners

However, the following topics may be relevant to the operation of the SNP if the content of the presentation relates to the tasks the SNP staff must perform:
- Process for submitting timesheets
- Benefits update
- Conflict of interest procedures

Local Wellness Coordinator
If the local wellness coordinator is not involved in the day-to-day operations of the SNP, the coordinator is not expected to meet the annual training requirements.

Office Staff, Full or Part-time Employees of the SNP
For office staff working on program activities 20 hours or more per week throughout the school year, staff members must meet the professional standards for training.

Office Staff, Temporary or Short Period of Time
Office staff members that process free and reduced-price meal applications or that provide other support for the school nutrition program for a short period of time during the school year are not required to meet the annual professional standards for training. However, this does not mean that the CE is not responsible for ensuring that these individuals receive adequate training specific to the tasks they perform.
Program Directors or Program Managers Providing Training
If program directors or managers provide continuing/education training, the directors or managers providing the training may count the training toward their required hours of training. However, if the program director or manager provides the same training multiple times, only the first instance may count toward the program director’s or program manager’s required training hours for the school year.

Refresher Training Provided Annually
Refresher training that must be completed each school year, such as civil rights or food safety, may be counted each year. While the training may cover some of the same topics as previous years, there will also be updated information for the current year.

Support Personnel, Delivery Staff
The program director must work with managers and staff to determine the training needs for delivery staff. If the food delivery employee performs tasks associated with safe food storage and transportation, the employee is expected to complete annual training on topics such as proper handling, delivery, and storage of perishable food products to ensure the safety of school meals and prevent food waste. If delivery staff do not perform these types of tasks, training is not required under the professional standards requirements.

Support Personnel
Employees who are not involved in program operation are not required to meet the training standards. This includes personnel such as janitorial custodians who are not involved in food preparation or food service.

Staff with Cognitive Disabilities
All SNP employees must receive the required training. This includes staff members with cognitive disabilities whether they work full time or part time. In appropriate circumstances, training events may be tailored to meet the employee’s abilities and duties. However, all training opportunities should be made available to all staff in order to avoid discriminatory practices.

Temporary, Substitute, or Acting Employees and Volunteers
TDA also highly recommends that CEs provide appropriate training to temporary, substitute, or acting employees and volunteers.

Vended Meal Provider
Vendors that provide pre-plated meals and do not perform program operation or management tasks are not required to meet the professional standards for

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4 Temporary or substitute employees are short-term workers, not employees who work over an extended period of time.
training. However, the CE is responsible for ensuring that a vendor providing pre-plated meals has the knowledge and skills to supply safe and nutritious meals that meet the meal pattern and dietary specifications.\(^5\)

### Training Design

#### Costs Associated with Training

The CE may charge all reasonable and allowable costs to the nonprofit school food service account for training, but must not pay for the cost of college credits incurred by an individual to meet the hiring standards.\(^6\)

#### Determining the Amount of Training Time to Credit

The amount of time an employee participates in learning activities during a continuing education/training event is the amount of time that credits toward the yearly amount of training hours—i.e., seat time. Time used for breaks, meals, and other non-learning activities does not count toward the yearly amount of training hours.

#### Focus of Training

Training must be job-specific and is intended to help employees perform their duties well. Training is expected to fall within the professional standards’ learning categories, topics, subtopics, and objectives and to be appropriate to the work conducted by the employee. See the *USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart* in this section for additional information on nutrition program-related learning categories, topics, subtopics, and objectives.

#### Format of Training Events

Training events may be conducted in a variety of formats. This includes, but is not limited to, the following:

- Conference presentations
- Hands on training
- Onsite training or workshops
- Video conferencing
- Webinars or web-based training events
- Workshops

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\(^5\) In determining if a vending contractor meets this exception, the CE should review the roles and responsibilities for the vendor to make sure it is not preforming operational or management responsibilities.

\(^6\) See the *Administrator’s Reference Manual, Section 14, Financial Information Concerning School Nutrition Funds* for additional information on reasonable costs.
Local, State, or Other Funding Source Training Requirements
If other governing or administering agency rules and/or regulations require training on specific topics or required hours, CEs must also meet those requirements as prescribed. If rules and regulations permit, dual crediting may be applied—that is, applying the same training hours to meet required hours for both sets of rules and regulations.

Selecting Program Director Training
Training for program directors includes, but is not limited to, administrative practices including applications, certification, verification, meal counting, and meal claiming procedures.

Sources for Training
Regulations do not require that training sources be provided by specific agencies, organizations, or individuals. However, it is the CE’s responsibility to ensure that all training opportunities focus on nutrition-related topics and are conducted by knowledgeable nutrition sources.

Nutrition program-related training may be provided by, but is not limited to, the following sources:

- Education Service Centers (ESCs)
- Local school nutrition program (in house)
- Nutrition conferences
- Nutrition focused vendors
- Nutrition organization
- Other knowledgeable nutrition sources
- State or federal agency
- Texas Department of Agriculture (TDA)

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As defined by the Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives subsection in this section.
Number of Training Hours for Each Position Type

The minimum amount of training required for employees is dependent upon the employee’s daily job functions and responsibilities for the assigned position as described in this section. All training must be job-specific and help the employee fulfill the employee’s job functions and responsibilities.

CEs may apply staff excess training hours received during one school year to the previous or next school year as demonstrated in the Tracking Continuing Education/Training Chart Over a One-Year or Two-Year Cycle Chart.

However, this flexibility is not intended to be used to delay training so that CE staff only receive training every two years. Instead, it is intended to offer flexibility to assist the CE in managing and fostering long-term training goals at the local level. CE staff are required to receive some training each year.

| Tracking Continuing Education/Training Over a One-Year and Two-Year Cycle Chart* |
|------------------|------------------|------------------|------------------|------------------|
|                  | July 1-June 30   | July 1-June 30   | July 1-June 30   | July 1-June 30   |
| **One-Year Cycle** |                 |                 |                 |                 |
| Program Director: | 12 hours         | 12 hours         | 12 hours         | 12 hours         |
| Program Manager:  | 10 hours         | 10 hours         | 10 hours         | 10 hours         |
| Program Staff:    | 6 hours          | 6 hours          | 6 hours          | 6 hours          |
| **Two-Year Cycle** |                 |                 |                 |                 |
| Program Director: | 12 hours + 12 hours = 24 hours total | | | |
| Program Manager:  | 10 hours + 10 hours = 20 hours total | | | |
| Program Staff:    | 6 hours + 6 hours = 12 hours | | | |
| Program Director: | 12 hours + 12 hours = 24 hours | | | |
| Program Manager:  | 10 hours + 10 hours = 20 hours | | | |
| Program Staff:    | 6 hours + 6 hours = 12 hours | | | |

* Staff are required to receive some continuing education/training every year even if tracking continuing education/training across two years.
Continuing Education/Training Implementation Timeline

The Continuing Education/Training Minimum Hours Chart in this section provides specific information on the amount of training for each type of SNP position:

<table>
<thead>
<tr>
<th>Position</th>
<th>Amount of Continuing Education/Training</th>
</tr>
</thead>
</table>
| Program Directors                             | 12 hours each school year (July 1 to June 30) Specific to Food Safety  
  Program Directors Employed Prior to July 1, 2015  
  For SY 2015-2016  
  8 hours food safety training within 5 years of July 1, 2015 or 8 hours food safety training by June 30, 2016 and  
  After SY-2015-2016  
  8 hours of food safety training within five years of the date of the program director’s last completed 8 hours of food safety training.  
  Program Directors Employed On or After July 1, 2015  
  When Employed  
  8 hours of food safety training within 30 calendar days of his or her start date and  
  After Hiring  
  8 hours food safety training within five years of the date of the program director’s last food safety training.  
  Food safety training taken to meet the 8-hour requirement may be included in the program director’s yearly required continuing education/training hours. |
| Program Managers                              | 10 hours each school year (July 1 to June 30) |
| Other Program Employees Working 20 Hours or More Each Week | 6 hours each school year (July 1 to June 30) |
| Other Program Employees Working Less Than 20 Hours Each Week (Part time employees) | 4 hours each school year (July 1 to June 30) |
| Any Program Employee Hired After January      | Half (½) of hours required for role/position for each school year (July 1 to June 30) except for requirements related to food safety |
Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives

All continuing education/training opportunities are expected to fall under one or more of four subject categories:

1. Nutrition
2. Operations
3. Administration
4. Communication/Marketing

Each category is further subdivided into topics and subtopics and assigned a code so that CEs can track the topics addressed in the training provided to employees. Each category is assigned a list of learning objectives appropriate to the category.

When assigning the appropriate designations, only those areas that are well covered in the training event should be selected. The USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart in this section provides detailed information on the categories, topics, subtopics, and learning objectives by assigned code.

<table>
<thead>
<tr>
<th>USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000  Nutrition</td>
</tr>
<tr>
<td>1100  Menu Planning</td>
</tr>
<tr>
<td>1110  USDA Nutrition Requirements</td>
</tr>
<tr>
<td>Plan menus that meet USDA nutrition requirements for reimbursable meals, including calculating meal components.</td>
</tr>
<tr>
<td>1120  Cycle Menus</td>
</tr>
<tr>
<td>Plan cycle menus that meet all rules. Consider cost, equipment, foods available, storage, staffing, student tastes, and promotional events.</td>
</tr>
<tr>
<td>1130  Local Foods/Farm to School</td>
</tr>
<tr>
<td>Utilize local food sources, especially Farm to School, when possible.</td>
</tr>
<tr>
<td>1140  Standardized Recipes</td>
</tr>
<tr>
<td>Write standardized recipes, and use USDA Food Buying Guide for School Nutrition Programs (FBG).</td>
</tr>
<tr>
<td>1150  Menu Analysis</td>
</tr>
<tr>
<td>Analyze menus for school meal pattern requirements.</td>
</tr>
<tr>
<td>1160  Special Diets, Including Food Allergies</td>
</tr>
<tr>
<td>Plan meals to accommodate students requiring special diets, including food allergies.</td>
</tr>
<tr>
<td>1170  USDA Foods</td>
</tr>
<tr>
<td>Plan for effective use of USDA Foods.</td>
</tr>
<tr>
<td>Code</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>1200</td>
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<td></td>
</tr>
</tbody>
</table>
USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

2200 Serving Food

Employee will be able to correctly and efficiently serve food portions to meet all USDA school meal pattern requirements and encourage healthy food selections including those for special diets.

- **2210 Portion Sizes/Special Diets**
  Identify/serve portions of food items according to school meal pattern requirements and diet restrictions.

- **2220 Offer VS Serve**
  Use Offer Versus Serve correctly.

- **2230 Maintaining Food Quality and Appearance**
  Serve food to maintain quality and appearance standards.

- **2240 Serving Lines**
  Manage serving lines for clean and efficient operation.

2300 Cashier and Point of Service (POS)

Employee will be able to efficiently operate and utilize a Point of Service (POS) system, ensuring correct application of reimbursable meal components, Offer Versus Serve, and confidential student eligibility identification in a financially responsible manner.

- **2310 Reimbursable Meals**
  Count reimbursable meals according to meal pattern requirements (including Offer Versus Serve) and eligibility status.

- **2320 POS Financial Responsibility**
  Use financial responsibility at Point of Service.

- **2330 Free or Reduced Identification**
  Apply proper measures to prevent overt identification of students receiving free or reduced-price meals.

2400 Purchasing/Procurement

Employee will be able to effectively and efficiently implement purchasing procedures and practices in order to appropriately and best utilize supplies and USDA Foods to meet menu requirements and comply with all Federal, State, and local regulations.

- **2410 Product Specifications**
  Develop product specifications to best meet menu requirements.

- **2420 Bid Solicitation and Evaluation**
  Solicit, receive, and evaluate bids for award in compliance with Federal, State, and local regulations.

- **2430 Purchase Food, Supplies, and Equipment**
  Purchase food, supplies, and equipment through vendors, meeting CE specifications in compliance with Federal, State, and local procurement regulations and availability of USDA Foods.

- **2440 Food and Supplies Orders**
  Generate food and supply orders.

---

8  This objective would address such procedures as how transactions are handled at the point of service, for example: method in which cash is handled on receipt and until deposits are made; accounting method for recording revenue; making change.
### USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2450</td>
<td>Cooperative Purchasing Groups</td>
<td>Identify possible cooperative purchasing groups and geographic preference options.</td>
</tr>
<tr>
<td>2460</td>
<td>Contracts with Food Service Management Company</td>
<td>Develop and monitor contract(s) with food service management company, and/or others.</td>
</tr>
</tbody>
</table>

#### 2500 Receiving and Storage

Employee will be able to ensure proper inventory management including correct delivery and storage of inventory, and that which has been placed on hold or recalled.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2510</td>
<td>Inventory Management</td>
<td>Develop processes for inventory management.</td>
</tr>
<tr>
<td>2520</td>
<td>Receiving and Storage</td>
<td>Apply safe and effective inventory receiving and storage procedures.</td>
</tr>
<tr>
<td>2530</td>
<td>Hold and Recall</td>
<td>Understand hold and recall procedures.</td>
</tr>
</tbody>
</table>

#### 2600 Food Safety and hazard Analysis and Critical Control Point (HACCP)\(^9\)

Employee will be able to effectively utilize all food safety program guidelines and health department regulations to ensure optimal food safety.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2610</td>
<td>HACCP</td>
<td>Practice (Follow) a HACCP-based program.</td>
</tr>
<tr>
<td>2620</td>
<td>Food Safety-General</td>
<td>Practice general food safety procedures.</td>
</tr>
<tr>
<td>2630</td>
<td>Federal, State and Local Food Safety Regulations</td>
<td>Practice Federal, State, and local food safety regulations and guidance.</td>
</tr>
<tr>
<td>2640</td>
<td>Food Safety Culture</td>
<td>Promote a culture of food safety behaviors in the school community (includes training on food allergens).</td>
</tr>
</tbody>
</table>

#### 3000 Administration

#### 3100 Free and Reduced-Price Meal Benefits

Employee will be able to effectively certify, process, and verify free and reduced-price meal eligibility benefits in accordance with Federal and State regulations related to nutrition programs. Understand and apply the Community Eligibility Provision (CEP) to eliminate the administrative burden of school meal applications and be able to serve meals at no charge.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3110</td>
<td>Eligibility</td>
<td>Certify, process, and verify free and reduced-price meal eligibility benefits in compliance with Federal regulations.</td>
</tr>
<tr>
<td>3120</td>
<td>Direct Certification</td>
<td>Understand and practice direct certification procedures by your state.(^10)</td>
</tr>
<tr>
<td>3130</td>
<td>Community Eligibility Provisions (CEP)</td>
<td>Understand and apply the Community Eligibility Provision (CEP).</td>
</tr>
</tbody>
</table>

---

\(^9\) Hazard Analysis and Critical Control Points (HACCP)

\(^10\) See Administrator’s Reference Manual, Section 4, Determining Eligibility for additional information on this topic.
<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>3200</td>
<td>Program Management</td>
<td>Employee will be able to effectively manage staff and resources; prepare for administrative reviews, emergency programs; and utilize standard operating procedures.</td>
</tr>
<tr>
<td>3210</td>
<td>Staff Management</td>
<td>Manage staff work including scheduling.</td>
</tr>
<tr>
<td>3220</td>
<td>Standard Operating Procedures</td>
<td>Oversee standard operating procedures for routine operations.</td>
</tr>
<tr>
<td>3230</td>
<td>Healthy School Environment</td>
<td>Evaluate and utilize resources to promote a healthy school environment.</td>
</tr>
<tr>
<td>3240</td>
<td>Emergency Plan</td>
<td>Develop and implement emergency and disaster plans as needed.</td>
</tr>
<tr>
<td>3250</td>
<td>Water, Energy, and Waste Management</td>
<td>Manage water, energy, and waste.</td>
</tr>
<tr>
<td>3260</td>
<td>Administrative Review</td>
<td>Prepare for administrative reviews.</td>
</tr>
<tr>
<td>3300</td>
<td>Financial Management</td>
<td>Employee will be able to manage procedures and records for compliance with resource (financial) management with efficiency and accuracy in accordance with all Federal, State, and local regulations, as well as the administrative review.</td>
</tr>
<tr>
<td>3310</td>
<td>Meal Counting, Claiming, Managing Funds</td>
<td>Implement a system of checks and balances to ensure accuracy and integrity of meal counting and claiming, funds collected, and record keeping.</td>
</tr>
<tr>
<td>3320</td>
<td>Compliance with Regulations/Policies</td>
<td>Establish and document appropriate accounting procedures for all revenues and expenses, ensuring that all procedures comply with federal, state, and local regulations and Administrative Review.</td>
</tr>
<tr>
<td>3330</td>
<td>Budgets</td>
<td>Prepare a budget that appropriately reflects financial goals.</td>
</tr>
<tr>
<td>3340</td>
<td>Financial Analysis</td>
<td>Analyze financial statements and accounting procedures to make informed financial decisions and ensure alignment with budget and regulations.</td>
</tr>
<tr>
<td>3350</td>
<td>Pricing</td>
<td>Calculate and recommend prices for meals and other food items to CE authorities, maintaining compliance with Federal, State, and local guidelines.</td>
</tr>
<tr>
<td>3360</td>
<td>Communicate Financial Information</td>
<td>Communicate financial goals, status, and other data to appropriate CE and state authorities.</td>
</tr>
</tbody>
</table>
### USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

#### 3400 Human Resources and Staff Training

Employee will be able to implement human resources management practices through maintenance and familiarity with current personnel policies and procedures and support employees through training and retention strategies.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3410</td>
<td>Human Resources Management</td>
<td>Understand and apply human resource management practices.</td>
</tr>
<tr>
<td>3420</td>
<td>Policies and Procedures</td>
<td>Implement current personnel policies and procedures.</td>
</tr>
<tr>
<td>3430</td>
<td>Training Plans and Tracking</td>
<td>Develop employee training plans, including a plan for tracking training.</td>
</tr>
<tr>
<td>3440</td>
<td>Retention, Promotion, and Recognition</td>
<td>Implement a system for employee retention, promotion, and recognition.</td>
</tr>
<tr>
<td>3450</td>
<td>Employee Health, Safety and Wellness</td>
<td>Foster employee health, safety, and wellness (includes training on First Aid and Cardiopulmonary resuscitation [CPR]).</td>
</tr>
</tbody>
</table>

#### 3500 Facilities and Equipment Planning

Employee will be able to evaluate school nutrition program equipment and facilities to ensure maximum efficiency and availability of healthy food choices.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3510</td>
<td>Facility and Equipment Planning</td>
<td>Evaluate/plan facilities and equipment to meet program goals.</td>
</tr>
<tr>
<td>3520</td>
<td>Equipment Purchasing and Maintenance</td>
<td>Maintain plans for purchasing and maintaining equipment.</td>
</tr>
</tbody>
</table>

#### 4000 Communication/Marketing

Employee will be able to develop plans that include involvement with school and community members, empower school nutrition leaders, and address excellent customer service.

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4110</td>
<td>Strategic and Marketing Plans</td>
<td>Develop strategic plans and marketing plans that reflect program goals and enhance interaction with stakeholders.</td>
</tr>
<tr>
<td>4120</td>
<td>Program Promotion</td>
<td>Promote the Child Nutrition Program (CNP).</td>
</tr>
<tr>
<td>4130</td>
<td>Customer Service</td>
<td>Empower school nutrition staff to provide excellent customer service.</td>
</tr>
<tr>
<td>4140</td>
<td>Communication Skills</td>
<td>Develop communications skills.</td>
</tr>
<tr>
<td>4150</td>
<td>School and Community Communication</td>
<td>Communicate within the school, CE, and the community through multiple approaches to inform and educate stakeholders.</td>
</tr>
</tbody>
</table>
USDA Learning Categories, Topics, Subtopics, and Objectives by Code Chart

<table>
<thead>
<tr>
<th>Code</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4160</td>
<td>Smarter Lunchrooms Techniques</td>
<td>Create an environment that engages students to select and consume healthy foods with minimum waste, including Smarter Lunchroom techniques.</td>
</tr>
</tbody>
</table>

**Annual Civil Rights Training**

The annual civil rights training may be counted toward meeting the training standards.

**Unacceptable Topics for the Continuing Education/Training Professional Standards (Training Standards)**

The following topics do not credit toward meeting the training standards:

- Motivational speeches/training
- Advocacy training
- General leadership training
  
  [Exception: Leadership training that focuses on management areas in the approved USDA professional standard learning topics and objectives may count toward the training standards.]
- General staff meetings
  
  [Exception: Training on acceptable topics may be included in general staff meetings. In this case, the time dedicated to the training may be counted toward the training standards.]

**Food Safety Training**

Food safety training must be current as defined in the Continuing Education/Training Minimum Hours Chart.

CEs will find that there are a wide range of possible sources for food safety training, including, but not limited to, the following:

- Accrediting agencies or organizations
- City, county, and state agencies
- Education service centers (ESCs)

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11 Resources on Smarter Lunchroom practices are available at [www.squaremeals.org](http://www.squaremeals.org) and [www.smarterlunchrooms.org](http://www.smarterlunchrooms.org).
Hiring Professional Standards (Hiring Standards) for Program Directors

The hiring standards for program directors described in this subsection apply to employees hired on or after July 1, 2015 or employees who were hired for a position that was advertised after July 1, 2015.

Hiring standards for program directors are based on total student enrollment for the CE for all schools participating in the program— all students enrolled in all CE sites operating a CNP even if the sites are located across the state. Total enrollment should be based on the most current October enrollment data.

For Example: A charter school system has schools located in Dallas, El Paso, Fort Bend, and San Antonio. The program director hiring standards are determined by the total enrollment across all of the CE’s schools participating in the program.

CEs must not hire any individual for the program director position unless that person meets the applicable qualification standards.\(^\text{13}\)

Special Situations, Hiring Program Directors

The following guidance addresses special situations related to the professional standards and hiring program directors.

Date of Hiring

The actual date the program director is hired determines if the hiring standards apply.

_Hired and Employed Before July 1, 2015_

The hiring standards for program directors as described in this section do not apply in the following circumstances:

1. Program directors who continue to be employed in their current CEs when the program director was hired and employed before July 1, 2015

2. Program directors who move to another position within the CE that hired and employed them before July 1, 2015

For Example: A program manager who was employed by the CE prior to June 30, 2015 was promoted to program director on August 1, 2015. This staff member is not required to meet the hiring standards for program directors hired on or after July 1, 2015.

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\(^{12}\) See the Education Professional Standards for Program Directors subsection in this section for the specific student enrollment ranges.

\(^{13}\) See CE Total Student Enrollment of 500 or Less subsection in this section for additional information on the program director hiring exception for very small schools.
3. Program directors who move to another CE with the same or lower total student enrollment level as the CE that employed them as of June 30, 2015

For Example: A program director who is employed by a CE with a total student enrollment of 3,500 on June 30, 2015 is hired by another CE with a total student enrollment of 4,200 on January 5, 2016. This staff member is not required to meet the hiring standards for program directors hired on or after July 1, 2015 because both CEs are in the 2,500 to 9,999 group.

4. Program directors who have taken positions that were advertised prior to July 1, 2015

Hired and Employed On or After July 1, 2015

The professional standards for hiring program directors as described in this section apply to program directors hired on or after July 1, 2015 unless the new program director meets one of the exceptions described in the Hired and Employed Before July 1, 2015 subsection in this section.

Contracted Services

The hiring standards requirements for program directors include personnel employed by food service management companies and other vendors engaged in program operation and/or program management.

Food Service Management Company

If an FSMC operates an SNP for a CE, the CE must request documentation from the FSMC that demonstrates that the FSMC is in compliance with program director hiring and training standards. This documentation may also be requested for an administrative review. It is the CE’s responsibility to ensure that the FSMC meets these requirements. The CE must include this requirement in its FSMC solicitation and contract.

Personnel Employed by a CE with Locations Across the State

If a CE has multiple schools located in different areas of the state, the hiring standards for the program director are based on the total student enrollment for the CE across all locations participating in the program.

Personnel Employed by More Than One CE

If an individual is employed by more than one CE, the individual must meet the highest hiring standards based on the largest CE’s total student enrollment for schools participating in the program.
Shared Program Director Responsibilities
When the responsibilities that are normally associated with the director’s position are divided among multiple staff members, the person with the majority of the director’s job responsibilities must fulfill the program director hiring standards.

Education Professional Standards for Program Directors
The educational requirements for program directors hired on or after July 1, 2015 are based on the CE’s total student enrollment. For the hiring standards, total student enrollment means the total student enrollment based on the most current October data at sites participating in the school nutrition program.

In cases where CEs have limited employment resources and have difficulty identifying a candidate for the program director position who will meet the educational and program experience requirements, CEs should contact TDA\textsuperscript{14} for assistance.

CE Total Student Enrollment of 2,499 or Less

Minimum Educational and Experience Background

- Bachelor’s degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or related field).

School nutrition experience is preferred, but not required.

or

- Bachelor’s degree or equivalent educational experience in any major and one year of relevant school nutrition experience.

or

- Associate’s degree or equivalent educational experience in a nutrition

\textsuperscript{14} The Contact Information for the Texas Department of Agriculture (TDA), Food and Nutrition page which follows the table of contents provides information on how to contact TDA directly.
specific or related major (academic major or concentration in food and
nutrition, food service management, dietetics, family and consumer
sciences, nutrition education, culinary arts, business, or a related field)
and at least 1 year of relevant school nutrition experience.

or

- High school diploma (or GED) and 3 years of relevant experience in
school nutrition programs.

Preferred Educational Background

Program directors who are hired and do not have an associate’s degree are strongly
encouraged to work toward attaining an associate’s degree.15

CE Total Student Enrollment of 500 or Less

CEs with a total student enrollment of 500 students or less that have made
attempts to hire a qualified program director but have been unable to hire a
qualified program director may apply for an exemption to hire an individual that
meets the following educational and experience professional standards:

Minimum Educational and Experience Background

High school or General Educational Development (GED)
diploma (or GED) and relevant school nutrition program
experience in any field that will help the individual be a
successful program director.

To apply for an exemption to the hiring standards, the CE
must submit the Hiring Professional Standards Exemption
Request for Contracting Entities (CEs) With Total Student
Enrollment of 500 or Less. This form is available through the
Download Forms screen in the Texas Unified Nutrition
Programs System (TX-UNPS) application packet. TDA will
notify the CE if the exception is approved.

In all cases, for an exemption to be valid, the CE must
apply and receive approval for the exemption for the
designated individual prior to hiring the individual.

CE Total Student Enrollment 2,500-9,999

Minimum Educational and Experience Background

- Bachelor’s degree or equivalent educational experience in a nutrition
specific or related major (academic major or concentration in food and
nutrition, food service management, dietetics, family and consumer
sciences, nutrition education, culinary arts, business, or related field).

School nutrition experience is preferred, but not required.

or

15 The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.
• Bachelor’s degree or equivalent educational experience in any major and least 2 years of relevant school nutrition experience.
  or
• Associate’s degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field) and at least 2 years of relevant school nutrition experience.

Preferred Educational Background
Program directors who are hired and do not have a bachelor’s degree are strongly encouraged to work toward attaining bachelor’s degree.16

CE Total Student Enrollment of 10,000 or More
Minimum Educational and Experience Background
• Bachelor’s degree or equivalent educational experience in a nutrition specific or related major (academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field).

School nutrition experience is preferred, but not required.
  or
• Bachelor’s degree or equivalent educational experience in any academic major and at least 5 years’ experience in school nutrition program management.

Preferred Educational Background
• Master’s degree or willingness to work toward master’s degree17
• At least one year of management experience, preferably in school nutrition, strongly recommended.
• At least 3 credit hours at the university level in food service management plus at least 3 credit hours in nutritional sciences at time of hiring strongly preferred.

16 The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.
17 The cost of college credits incurred by an individual to meet the hiring standards is not an allowable cost.
The *Education Experience—Hiring Professional Standard Chart* provides a comparison of the hiring professional standards by total student enrollment size.

| Educational Experience—Hiring Professional Standards Chart  
| (By Total Student Enrollment for Schools Participating in the Program) |
|---|---|---|
| **2,499 or Less** | **2,500-9,999** | **10,000 or More** |
| Bachelor’s degree or equivalent educational experience\(^\) in a nutrition specific or related major.*  
School nutrition experience is preferred, but not required. | Bachelor’s degree or equivalent educational experience\(^\) in any academic major and at least 1 year of relevant school nutrition experience | Bachelor’s degree or equivalent educational experience\(^\) in any major and at least 5 years of experience in school nutrition program management |
| or | or | or |
| Bachelor’s degree or equivalent educational experience\(^\) in a nutrition specific or related major and at least 1 year of relevant school nutrition experience | Associate’s degree or equivalent educational experience\(^\) in a nutrition specific or related major and at least 1 year of relevant school nutrition experience | Associate’s degree or equivalent educational experience\(^\) in a nutrition specific or related major and at least 2 years of relevant school nutrition experience |
| or | or | or |
| High school diploma (or GED) and at least 3 years of relevant school nutrition experience | | |

* Academic major or concentration in food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field.

\(^\) At least 60 college credits for an associate’s degree or a minimum 4 years of full-time college-level course work (about 120 hours) for bachelor’s degree.
Tools to Assist with Professional Standards

USDA and TDA have developed the following resources to assist CEs in implementing the professional standards.

**USDA Resource**
- Professional Standards for School Nutrition Professionals
  
  Available at [www.fns.usda.gov/school-meals/professional-standards](http://www.fns.usda.gov/school-meals/professional-standards)

**TDA Resources**
- *Continuing Education/Training Tracking Record* — CEs may use this Excel form to track staff professional development hours.
  
  Available at [www.squaremeals.org](http://www.squaremeals.org)

- *Hiring Professional Standards Exemption Request for Contracting Entities (CEs) With a Total Student Enrollment of 500 or Less* — CEs with a total student enrollment of 500 or less must use this form if requesting an exemption to hire a program director that does not meet the professional standards requirements.
  
  Available through the *Download Forms* screen in the Texas Unified Nutrition Programs System (TX-UNPS) Applications.

- *Hiring Program Director Checklist* — CE may use this form to determine if a candidate for a program director hired after July 1, 2015 meets the professional standards requirement.
  
  Available at [www.squaremeals.org](http://www.squaremeals.org)

**Records Retention**

CEs are required to maintain an organized system of records retention that is accessible to appropriate CE employees and federal or state reviewers. TDA may request documentation for both offsite and onsite administrative review processes. CEs have the option to maintain records in paper or electronically.

All documentation or records must be kept on file for a minimum of five years for public and charter schools or three years for private schools, other nonprofit organizations, and residential child care institutions after the end of the fiscal year to which they pertain. If audit findings have not been resolved, the records must be maintained as long as required for the resolution of the issues raised by the audit.

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Information Box 2

**Record Retention**

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

Private schools, other nonprofit organizations, and residential childcare institutions (RCCIs) are required to keep documentation for three years.
Documentation Related to Training

CEs must maintain records that demonstrate compliance for employees required to meet training standards, including food safety training.

Food Safety Training

While all employees may participate in food safety training, the CE must retain documentation that demonstrates that the program director has met the following standard. CEs need to ensure that records related to food safety training are kept for the full five years even if other records retention periods expire.

Existing Directors

Completed eight hours of food safety training within 5 years prior to July 1, 2015 or eight hours of food safety training by June 30, 2016 and 8 hours of food safety training within five years of the date of the program director’s last completed 8 hours of food safety training.

New Directors

Completed eight hours of food safety training within 30 calendar days of the employment start date and 8 hours of food safety training within five years of the date of the program director’s last food safety training.

Staff Training

The CE must retain records that provide the following information for each person attending a training event:\(^{18}\)

- Training event title and content\(^ {19}\) including topics/objectives
- Date and actual time participating in learning activities
- Source providing the training

Documentation includes, but is not limited to, attendance sign in sheets, continuing education/training agendas, certificates of attendance, and other training documents. The categories of information captured in TDA’s, Continuing Education/Training Tracking Record demonstrates what information must be retained and a method for doing this. However, CEs may use any organized method of retaining this documentation that meets the requirements described in this subsection.

\[^{18}\] This includes records for FSMC staff.
\[^{19}\] See the Continuing Education/Training Learning Categories, Topics, Subtopics, and Objectives subsection in this section for additional information on this topic.
If an FSMC operates the SNP for the CE, the CE must be able to demonstrate that it has reviewed documentation for the training standards and ensured the FSMC is in compliance with the requirements.

**Documentation Related to the Hiring Standards**

The CE must maintain records for all employees that demonstrate the following information:

- Name of each staff person
- Date hired
- Title/Position with a brief list of core responsibilities, including the employee’s position title, i.e., nutrition program director, manager, kitchen staff, or other staff
- Employment status, i.e., full time, part time, substitute

**Part Time Employees**

- Average hours per week for all part time employees

**Program Directors Hired on or after July 1, 2015**

For all program directors hired on or after July 1, 2015, the CE must maintain records for program directors that demonstrate the following information:

- Highest level of education achieved, areas of study or focus as appropriate
- Years of school nutrition program experience

**Approved Under 500 Exemption**

- Letter of approval and all documentation related to information provided to TDA in the request for an exemption

**Transfer to Another Position within the CE or to a CE of the Same Size**

- Documentation necessary to demonstrate that program director was employed by the CE’s SNP prior to July 1, 2015
- Documentation demonstrating that the enrollment of the transfer location is in the same total enrollment group (2,499 or less; 2,500 to 9,999; or 10,000 or more) as the originating CE. Total enrollment should be based on the most current October enrollment data.

Appropriate documentation for the hiring standards includes, but is not limited to, college transcriptions (with social security number and other confidential information redacted) and resumes.
Compliance

TDA will review CE documentation related to professional standards during an administrative review or as appropriate to determine if the CE is meeting the hiring and training requirements. If the CE is not in compliance with the requirements, TDA may require a corrective action plan that demonstrates that the CE has developed approvable procedures and actions to correct noncompliance within a specified period of time.