

FOOD SERVICE OPERATIONS

Best Practices and Indicators

Planning, Organization and Staffing

1. The program has developed strategic or operational plans that are consistent with district plans, the program budget, and approved by the district.

- a. The food services program has a broadly-approved plan that is consistent with the district's strategic plan.
- b. The district has an appropriate vision or mission statement so team member share a common, agreed-upon purpose.
- c. Program management has developed goals that support the mission statement and objectives to assist in the accomplishment of these goals. These objectives should be quantifiable so that progress toward goal accomplishment can be measured.
- d. Program management has prepared a budget that is based on its plan, goals and objectives, and not limited to historical, incremental increases.
- e. The district has integrated automation (data and equipment) opportunities and needs into its plans.
- f. The district has integrated kitchen renovations into its plans and budgets where needed.
- g. The district food program has reviewed, modified as needed, and approved kitchen layouts and designs in plans for new schools.
- h. Is there other information that demonstrates the district's use of this best practice that should be considered?

2. The district and program are organized with clear lines of responsibility and in a manner that provides the food service program sufficient authority to succeed.

- a. Food service program management has developed an organizational chart that accurately reflects the food service program.
- b. The food service program has organizational units that minimize administrative layers.
- c. District management has appropriately positioned the food service program in the district organization to have sufficient authority to fulfill its responsibilities.
- d. Program management has developed organizational relationships designed to allow and promote the food service program to succeed.
- e. Span-of-control is appropriate within the program's organization.
- f. Food service staffing levels are appropriate considering such information as the number of meals served, serving periods, and student participation.
- g. Is there other information that demonstrates the district's use of this best practice that should be considered?

3. Program management has developed training designed to meet basic program needs as well as improve food services, both based on a needs assessment.

- a. Program management analyzes and develops training plans that are comprehensive and periodically includes essential functions of the program (food safety, portion control, production control, special diets, inventory, meal count procedures, receiving and storage of food and supplies, emergency procedures, customer service).
- b. Program management addresses in its training plan the needs of new employees and filling of future management positions, such as an intern development program.
- c. Is there other information that demonstrates the district's use of this best practice that should be considered?

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Management

4. Program management has developed comprehensive procedures manuals that are kept current.

- a. Food service management has developed program procedures that are consistent with overall district policy.
- b. Program management has developed a procedures manual for cafeteria managers that covers essential areas of responsibility and communicates management intent (key areas include, at a minimum, cash control, receipt of goods, inventory procedures, production record keeping, sanitation and food safety, employee safety, emergencies in case of injury, and ordering of food and supplies).
- c. If appropriate for the size of district, central staff procedure manuals have been developed to cover key areas of responsibility and communicate management intent (such areas as warehousing, procurement, technical assistants, area managers, dietitians, etc.).
- d. Is there other information that demonstrates the district's use of this best practice that should be considered?

5. The district performs sound cash and account management.

- a. The food service program's unreserved fund balance is sufficient to operate the program and is not dependent upon general fund transfers for operations.
- b. The program has a five-year cash flow budget in-place that meets planned needs and will not require use of general fund monies.
- c. Program managers submit and receive federal and state reimbursements timely (requested within 30 days).
- d. The program directly, or through the district's indirect services rate pays for appropriate program-related expenses (e.g., trash removal, utilities, equipment, repairs, cafeteria renovation) to ensure general fund monies intended for the classroom are not diverted to support the food service program.
- e. Is there other information that demonstrates the district's use of this best practice that should be considered?

6. District and program management optimizes its financial opportunities.

- a. The district analyzes and aggressively seeks to expand its food service operations as opportunities are developed or arise.
- b. Program management takes full advantage of USDA Donated Foods, by (1) ordering its full annual allocation, (2) considering purchased food prices when developing commodities allocation orders, (3) accepting additional allocations when offered and needed, and (4) using commodity processors when financially advantageous.
- c. The district board, district management, and food service management periodically reviews to ensure that pricing of meals and a la carte items are appropriate and at a level to meet budget needs.
- d. At least every 5 years, district and program management assess the efficiency and effectiveness of its core process functions (i.e., warehousing, delivery, procurement, and management).
- e. Is there other information that demonstrates the district's use of this best practice that should be considered?

Performance and Accountability

7. Food service program management has developed comprehensive performance and cost-efficiency measures that provide management with information to evaluate program performance and better manage operations.

- a. Program management has developed *program-level* performance and cost-efficiency measures such as, net income margin, food cost margins, salary plus benefits margin, and participation rates (free and reduced as percentage of eligible and overall participation).

*Best Financial Management Practices With Their Associated Indicators
Best Practices (1, 2, 3 . . .) and Indicators (a, b, c . . .)
Adopted June 2002*

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- b. Program management has performance and cost-efficiency measures in-place to assist in managing *school-level* operations, such as meals per labor hour, salaries plus benefits margin (lunch and breakfast) and food cost margin (lunch and breakfast).
- c. Program management uses sound methodology to develop performance and cost-efficiency measure benchmarks, such as historical performance, comparison with peers, and then integrated planned program changes.
- d. Program and district management periodically review its performance and cost-efficiency measures and benchmarks to ensure reliability and relevance.
- e. Is there other information that demonstrates the district's use of this best practice that should be considered?

8. At least annually, the program inspects and evaluates its operational components and the system as a whole, and then takes action to initiate needed change.

- a. Program management has an inspection system to ensure that policies and procedures are followed and at a minimum, address each of the following areas:
 - Program management protects and accounts for its assets (cash, equipment, food, and supplies).
 - Warehousing for the program is appropriate (what and where is it stored).
 - Program management protects its personnel by having safety procedures in-place as well as prepared for treatment or care in case of injury.
 - Program management ensures that food is prepared safely, staff are using the menu ingredients per instructions, and that proper portion control procedures are followed.
- b. Program management has a viable preventive maintenance and long-range equipment replacement program in-place.
- c. Program management ensures that the district does its training plan, or appropriate alternative training.
- d. Program management has take appropriate action to improve operations when indicators of the operational evaluation system warrant.
- e. The district seeks to optimize its procurement opportunities.
 - Food service management is actively involved in the procurement process and assists in the development of product specifications that best match menus and supplier prices.
 - Large districts attempt to obtain bids by zone to maximize bidders and direct purchase product from suppliers.
 - Small districts evaluate the use of procurement coops in conjunction with other school districts when financially advantageous.
- f. Is there other information that demonstrates the district's use of this best practice that should be considered?

9. District and program administrators effectively manage costs of the food services program and use performance measures, benchmarks, and budgets on a regular basis to evaluate performance and use the analysis for action or change.

- a. The program has a reporting system that provides accurate and timely information.
- b. Program management evaluates staff allocation and makes adjustments as needed, at each school, 5 to 8 weeks into each new school year, and mid-year, if permitted by labor contract.
- c. Program management, at least quarterly, uses food and labor costs (or similar measures) to monitor menu costs, trends, production, and waste for each school site and the program overall.

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- d. Program management periodically informs district management of program performance using performance measures and financial information and makes recommendations for action.
- e. Is there other information that demonstrates the district's use of this best practice that should be considered?

10. The food service program and district complies with federal state and district policy.

- a. The district has demonstrated a "good faith effort" in the latest Department of Education School Meals Initiative review.
- b. The district passed its latest Department of Education Coordinated Review Effort examination.
- c. The district passed its latest USDA Donated Foods inspection.
- d. Program management ensures federal and state vending machine rules are followed and districts policies and practices support these rules.
- e. Is there other information that demonstrates the district's use of this best practice that should be considered?

11. The district conducts activities to ensures that customer needs are met and acts to improve services and food quality where needed.

- a. Program management identifies barriers to student participation and methods used to overcome barriers are appropriate for the circumstance.
- b. Program and district management has developed an effective suggestions system that readily accepts and ensures complaints are considered.
- c. Program management periodically contacts stakeholders (students, parents, principals, and teachers) to solicit comments and ideas.
- d. Is there other information that demonstrates the district's use of this best practice that should be considered?