OPI School Nutrition Programs

Administrative Update

Contact Us:

CALL
406-444-2501

VISIT

opi.mt.gov/schoolnutrition

August 4, 2023

Welcome to school year 2023-24!

The OPI School Nutrition Programs is pleased to start the year off by announcing that Erin Turner has moved into a new role as the Assistant Director of School Nutrition Programs and Christine Emerson continues to lead the team as our Director. We are also happy to announce that Tarryn Erickson is our new Administrative Assistant, Britta Binde is our new Summer Food Service Program Specialist, and Amber Lyman is our new Farm to School Specialist. Rochelle Davies, Kelli Johnson, Lauren Donithan, and Stephanie Moodry are our dedicated School Nutrition Programs Specialists and are joined by Emily Madsen, our new region 2 and 3 SNP Specialist, and Rachel Ariaz, our new short-term SNP Specialist. Alie Wolf, Ashley Bodle, and Bitsey Draur are our technical support staff. The team's contact information is on the Staff Directory page of this packet.

Thank you to everyone who worked to submit your application updates for the school year. We hope to complete the annual School Nutrition application renewal process by the end of August and prior to your school year operations beginning.

Please remember to check the OPI School Nutrition Programs website School Nutrition Programs regularly for program guidance, professional development opportunities, grants, and events. We also house many resources for Food Service Directors and Claim Contacts to access in the MAPS Document Library.

SY2023-24 is back to normal NSLP/SBP operations and program requirements must be followed. Please ensure that proper meal counts are being taken/counted at the point of service when the child receives the meal. Please see the SY2023-24 SNP Checklist in this document to be guided by program requirements and due dates.

We look forward to seeing you at our fall workshops, and during our Administrative Review or Technical Assistance visits. Please call us at 1-406-444-2501 anytime you have questions.

Warm regards, the School Nutrition Programs Team.

Administrative Update Packet Included Content:

If you are new to working in School Nutrition Programs, we recommend that you contact your Regional School Nutrition Program Specialist to ensure you are set up for success in meeting School Nutrition Program requirements. If you need to request access to MAPS, complete the MAPS User Access Form.

What's New in School Nutrition Includes most recent School Nutrition Program updates and National School Lunch Program & School Breakfast Program meal patterns.

OPI School Nutrition Programs Staff Directory Find contact information for all OPI School Nutrition Programs and Montana Team Nutrition staff.

School Nutrition Programs Checklist Use this checklist as a tool to meet all requirements for School Nutrition Programs. Please look for these forms on the OPI School Nutrition Programs website or in MAPS under *Applications > Document Library.*

Procurement Checklist Consult this checklist for help in planning and for all major SNP procurement requirements.

Civil Rights Training Documentation Civil rights training must be completed annually with all staff involved with School Nutrition Programs. *Civil Rights Training* can be found on the OPI School Nutrition Programs website on the Civil Rights page or via our online Bright Track course.

SY2023-24 Household Free/Reduced Application Households may complete paper application or we recommend all schools opt into using the new Online Free & Reduced Price Application that households can submit online for your school to process.

SY2023-24 Income Eligibility Guidelines & Verification Instructions See below in document.

Self-Review: Meal Counting and Claiming Form Schools must visit each site at least once during each meal service to ensure proper meal counting procedures are being followed for counting and claiming reimbursable meals. This is required to be conducted close to the beginning of the school year and by February 1st.

Professional Standards Requirements Use this guide to understand minimum hiring standards for new School Nutrition Programs Directors and annual continuing education requirements for all School Nutrition Program staff.

Professional Standards Calendar and Continuing Education Opportunities Save the Date! OPI School Nutrition Programs will have live Fall Workshops in September along with a virtual workshop, on August 30th, and continue to offer one-hour Webinar Wednesdays throughout the year from 2-3 PM. See the schedule for this year's scheduled education opportunities, and join us for fun and learning.

Montana Team Nutrition/Farm to School Update Montana Team Nutrition (MTN) is housed at Montana State University and works in cooperation with OPI to deliver quality education, training, and outreach opportunities to schools. Learn about the great opportunities MTN has planned this school year, as well as important information and resources on school wellness, Farm to School, and more.

Normal National School Lunch Program (NSLP) Operations

- **New online Free and Reduced-Price School Meal Applications**
    - We now offer an online version of the free/reduced applications for families to fill out. Once your school signs up, you simply provide the link to your families to fill out the applications and it is then electronically sent to the Direct Certification Application (DCA). You can find all the information on our website under Meal Eligibility.
- **30 Day Carryover**
    - Reminder: the carryover is 30 *operating* days (school days), not calendar days.
    - Reminder: the carryover status is valid only until a new determination is made (ex: new application processed.)
- **New Medicaid Direct Certification**
    - New July 1, 2023. Eligibility may only be made via the OPI Direct Certification Application (DCA)
        - Medicaid - Free
        - Medicaid - Reduced
        - Medicaid eligibility is determined by household size/income and is the only DC source with the 'reduced' determination. See New Medicaid Direct Certification in DCA Tip Sheet.
- **Supply Chain Assistance Funds (SCA)**
    - USDA announced more SCA funds will be coming for SY23-24 ($4,232,110 for Montana to distribute out to schools this year). Stay tuned for more information.
- **Local Food for Schools Sub-Grant Opportunity for Schools**
    - Over $700,000 available to award out via competitive sub-grants ($5,000 to $25,000) to schools procuring local and regional foods. Stay tuned for more information and grant application.

Other Program Updates

- **Public Release Requirement**
    - OPI will once again be completing the public release on behalf of all our sponsors again this year. You can find it posted on our website under Meal Eligibility.
- **New Nondiscrimination Statement**
    - Update all program materials, including the home page of your school nutrition program website, with 2022 Nondiscrimination Statement.
    - Ensure you have the And Justice for All poster posted in your cafeteria. Request the poster if needed.
- **Meal Patterns**
    - See the 5-Day National School Lunch Program and School Breakfast Program Meal Patterns in this document below. If school is operating a 4-Day school week, please refer to and follow the 4-Day Lunch Meal Pattern or 4-Day Breakfast Meal Pattern.

- **Meal Patterns continued**
  - Proposed Updates to the School Nutrition Standards
  - No updates to the NSLP/SBP Meal Patterns to report with the proposed USDA meal pattern updates, but any potential changes would not be in effect until SY24-25 or SY25-26.
  - **Whole Grains**: At least 80% of the grains served in school lunch and breakfast per week must be whole grain rich (containing at least 50% whole grains).
  - **Sodium**: Current transitional standards makes a 10% sodium reduction in Fall 2023 for NSLP. The weekly sodium limit for school lunch has decreased 10%, known as Target 1A, for school year 2023- 2024 to put schools on an achievable path toward long-term sodium reduction, which will be addressed in future rule making.

National School Lunch Program Transitional Sodium Timeline & Limits		
Age/Grade Group	Target 1: Effective July 1, 2022	Interim Target 1A: Effective July 1, 2023
K-5	≤ 1,230 mg	≤ 1,110 mg
6-8	≤ 1,360 mg	≤ 1,225 mg
9-12	≤ 1,420 mg	≤ 1,280 mg

School Breakfast Program Transitional Sodium Timeline & Limits	
Age/Grade Group	Target 1: Effective July 1, 2022
K-5	≤ 540 mg
6-8	≤ 600 mg
9-12	≤ 640 mg

More Supply Chain Assistance Funds Available for SY2023-24

To help address any supply chain distribution challenges, Supply Chain Assistance (SCA) funds were distributed to Montana School Food Authorities (SFAs) in SY2022-23 and more supply chain assistance funds will be distributed out to schools during SY2023-24.

Because the underlying conditions fueling supply chain disruptions and distribution issues that may continue to affect operations, more rounds of SCA funds will be distributed to assist SFAs in their efforts to provide nutritious meals to children. The OPI will allocate these SCA funds using a determined formula out to schools.

Stay tuned for planned disbursement dates. Funds will be deposited into the non-profit school foodservice account.

SCA funds are to be used for the purchase of unprocessed or minimally processed domestic food products.

SFAs are required to maintain documentation supporting food purchases that are allowable for SCA purposes (i.e. unprocessed or minimally processed domestic food products) consistent with the regular program record keeping requirements. However, SCA funds deposited to the non-profit school foodservice account do not need to be separated from other monies within the account and are not tracked separately from an accounting standpoint.

Reach out to your regional specialist with any questions

National School Lunch Program (NSLP) Meal Pattern - 5 Day

Just Serve Instructions:	Offer versus Serve (OVS) Instructions:
• Must PREPARE all 5 components in required amount. • At POS: Must SERVE all 5 components in minimum required amount.	• Must PREPARE all 5 components in required amount. • At POS: Must TAKE 3 components: at least 1/2 cup of fruit or vegetable & 2 other components in minimum required amount.

Food Components	Grade K - 5	Grade 6 – 8	Grade 9 - 12	Additional Information
Milk Must offer two varieties and one variety must be unflavored.	5 cups/week 1 cup daily	5 cups/week 1 cup daily	5 cups/week 1 cup daily	All fluid milk must be fat-free (skim) or low-fat (1 percent). Milk may be unflavored or flavored.
Fruits	2 ½ cups/week 1/2 cup daily min	2 ½ cups/week 1/2 cup daily min	5 cups/week 1 cup daily min	Only 100% fruit juice is allowed. No more than half the weekly offering of fruit may be 100% juice.
Vegetables (total) Subgroups:	3 ¾ cups/week 3/4 cup daily min	3 ¾ cups/week 3/4 cup daily min	5 cups/week 1 cup daily min	Daily minimum must be offered (or 'served'). For OVS, ½ cup may be taken. • Leafy greens credit as half the amount. Dried fruit credits as double. *Additional Vegetables from any subgroup must be offered in order to meet weekly total.*
Dark Green	1/2 cup/wk	1/2 cup/wk	1/2 cup/wk	
Red / Orange	3/4 cup/wk	3/4 cup/wk	1 ¼ cup/wk	
Legumes	1/2 cup/wk	1/2 cup/wk	1/2 cup/wk	
Starchy	1/2 cup/wk	1/2 cup/wk	1/2 cup/wk	
Other	1/2 cup/wk	1/2 cup/wk	3/4 cup/wk	
Additional Vegetable	1 cup/wk	1 cup/wk	1 ½ cup/wk	
Meat or Meat Alternates	8-10 oz eq/wk* 1 oz daily min	9-10 oz eq/wk* 1 oz daily min	10-12 oz eq/wk* 2 oz daily min	Daily & Weekly requirements must be met
Grains / Breads - At least 80% of grain items offered must be whole grain rich (WGR)	8-9 oz equivalent/wk* 1 oz daily min	8-10 oz equivalent/wk* 1 oz daily min	10-12 oz equivalent/wk* 2 oz daily min	Daily & Weekly minimums must be met • 2 oz eq grain-based desserts or less may be offered weekly.
Minimum – Max. Calories (kcal)	550 – 650	600 – 700	750 - 850	-Weekly average
Saturated Fat (% of total calories)	<10%	<10%	<10%	-Weekly average
Sodium Target 1A**	≤1110 mg**	≤1225 mg**	≤1280 mg**	-Weekly average **Sodium Target 1A limit for NSLP SY23-24
Trans Fat	0 grams / serving	0 grams / serving	0 grams / serving	

*Staying within the maximums for Grain & M/MA helps with dietary specifications but is not required.

**Sodium targets will decrease by 10% in SY2024-25 for lunch.

SBP Meal Pattern - 5 Day
School Breakfast Program

Serve Only
- Minimum 3 items served daily
- Must prepare each of 3 required items in required amounts:
  - **Milk**, **Fruit**/Vegetable, **Grain**
- Students must have all items on tray at POS

Offer vs. Serve (OVS)
- Minimum 4 items offered daily
- Must prepare each of 3 required items plus an additional item:
  - **Milk, Fruit**/Vegetable, **Grain, and 1 additional item** (may be meat/meat alternate, grain, or fruit/vegetable)
- At POS: Must take at least 3 items, 1 item must be ½ cup Fruit or vegetable.

Food Components	Grade K - 5	Grade 6 – 8	Grade 9 - 12
Milk -Must offer two varieties (1% or fat-free, unflavored, or flavored). One of the varieties offered must be unflavored.	5 cups/week 1 cup daily	5 cups/week 1 cup daily	5 cups/week 1 cup daily
Fruits / Vegetable / Juice -Juice must be 100% full-strength. -No more than half weekly offering may be juice.	5 cups/week 1 cup daily	5 cups/week 1 cup daily	5 cups/week 1 cup daily
Grains / Breads -Daily & weekly minimums must be met -At least 80% of grain items offered must be whole grain rich (WGR)	7-10 oz equivalent/week* 1 oz daily minimum	8-10 oz equivalent/week* 1 oz daily minimum	9-10 oz equivalent/week* 1 oz daily minimum
(Meat or Meat Alternates)	None required but may substitute 1 oz eq of meat /meat alternate for 1 oz eq of grains after minimum daily grain is met.		
Minimum – Maximum Calories (kcal) Weekly average	350 – 500	400 – 550	450 - 600
Saturated Fat (% of total calories) Weekly average	<10%	<10%	<10%
Sodium Target 1* Weekly average	≤ 540 mg	≤ 600 mg	≤ 640 mg
Trans Fat	0 grams/serving	0 grams/serving	0 grams/serving

*Staying within the maximums for Grain & M/MA helps with dietary specifications but is not required.

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Office of Public Instruction

School Nutrition Programs - Staff Directory

School Nutrition Programs, General Information

Phone: 406-444-2501
Mailing Address: Office of Public Instruction
School Nutrition Programs
PO Box 202501
Helena, MT 59620-2501

Contact	Phone	Email
Christine Emerson, Director	406-444-2502	cemerson@mt.gov
Erin Turner, Assistant Director	406-559-7588	erin.turner@mt.gov
Tarryn Erickson, Administrative Assistant	406-444-2501	tarryn.erickson@mt.gov
Britta Binde, Summer Food Service Program Specialist	406-594-9747	britta.binde@mt.gov
Vacant, Food Distribution Program Manager	406-444-4412	@mt.gov
Amber Lyman, Farm to School Specialist	406-444-2501	amber.lyman@mt.gov
Alie Wolf, Business Analyst/Direct Certification	406-459-5394	aliew@mt.gov
Ashley Bodle, Data Processor	406-594-9228	ashley.bodle@mt.gov
Kelli Johnson, Region 1 Specialist, FFVP Manager	406-465-1769	kelli.johnson@mt.gov
Emily Madsen, Region 2 & 3 Specialist, School Nutrition Programs	406-594-4142	emily.madsen@mt.gov
Lauren Donithan, Region 4 Specialist, School Nutrition Programs	406-594-7313	lauren.donithan@mt.gov
Stephanie Moodry, Region 5 Specialist, School Nutrition Programs	406-459-3552	stephanie.moodry@mt.gov
Rochelle Davies, Region 6 Specialist, School Nutrition Programs	406-465-3154	rochelle.davies@mt.gov
Rachel Ariaz, Specialist, School Nutrition Programs	406-422-3318	rachel.ariaz@mt.gov

Montana Team Nutrition, General Information

Phone: 406-994-5641
Fax: 406-994-1854
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Montana State University
PO Box 173370
Bozeman, MT 59717

Contact	Phone	Email
Molly Stenberg, Co-Project Director	406-994-7217	stenberg@montana.edu
Jay Stagg, Co-Project Director & Farm to School Coordinator	406-994-5996	jay.stagg@montana.edu
Haley Scott, Program Lead	406-994-5641	haley.scott1@montana.edu
Kylie Cassidy Administrative Coordinator	406-994-5397	kylie.cassidy@montana.edu

School Nutrition Programs Checklist
SY 2023-24

Use this document to check off School Nutrition Programs requirements as they are completed.
Assign individual responsibilities to staff and document the date they are finished. Keep this checklist on file for your reference.

Task	Deadline	Documentation	Date Completed	Who
Free and Reduced (F/R) Benefits				
*Complete direct certification through the Direct Certification Application (DCA) <u>at least 3 times per year</u>. Mail notice of direct certification to households.	• Beginning of SY • 3 months into SY • 6 months into SY	Update Point of Sale. Maintain DCA lists on file.		
*Have F/R applications available for those who are not directly certified.	Start of school year (ongoing)	Record procedure		
*Approve F/R applications. Mail approval/denial notification to households.	Start of school year (ongoing)	Keep applications		
*Update any F/R students from the previous school year without a current application to paid status. Mail notification of change in eligibility.	30 operating days after first day of school	Update Point of Sale		
Verification (*Does not apply to Provision/CEP schools*)				
*Select households for verification.	On October 1	Use the verification activity tracker		
*Complete verification process	By November 15	MAPS		
*Submit Verification Report (FNS-742) in MAPS	By November 30	MAPS		
Community Eligibility Provision (CEP)				
Qualify for CEP if 40% of enrolled students (per site) are directly certified.	April 1	DCA		
Review Identified Student Percentage (ISP) counts. Send corrections and finalize ISP counts.	April 15	ISP-CEP Annual Snapshot Data Form- submit to OPI		
Elect participation in CEP for School Year 2023-24.	June 30	MAPS site application and CEP Schedule		
Required Self-Reviews				
Conduct review of Meal Counting and Claiming System for both <u>breakfast</u> and <u>lunch</u> meal service at all sites.	February 1	Keep a copy (form in MAPS)		
If participating, conduct <u>two</u> After School Snack Program (ASP) reviews.	First Four Weeks Before End of Year	Keep a copy (form in MAPS)		
Fresh Fruit and Vegetable Snack Program (FFVP) (*OPI invites districts to be a part of FFVP each year based on Free/Reduced data*)				
Eligible elementary schools are invited to participate in MAPS. Complete the FFVP Application in MAPS application packet.	June	MAPS FFVP Application		
Claim FFVP expenses on the MAPS FFVP Claim. To see your remaining FFVP grant allocation balance, navigate to FFVP Grants within the Applications section of MAPS.	Use 1st allocation by September 30, Spend 2nd allocation October 1 – June 30	Keep all receipts; submit FFVP claim in MAPS by the 10th of each month		
Professional Standards				
Complete Professional Standards training hours. See OPI Professional Standards Training Schedule on the website. • Director - 12 hours • Manager - 10 hours • Full Time (≥ 20 hours/week) - 6 hours • Part Time (<20 hours/week) - 4 hours	Annually	Document training hours completed on a training log		

* Indicates requirements that may not apply to RCCIs/CEP schools.

All documentation for the items listed must be kept on file for three years plus the current year.

Reminder: Claims for reimbursement are due on the 10th of each month.

School Nutrition Programs Checklist
SY 2023-24

Task	Deadline	Documentation	Date Completed	Who
Annual Requirements				
Update Sponsor/Site Information.	August 30	MAPS		
Complete production records.	Daily	Keep original records		
*If breakfast is offered, complete breakfast outreach. Ex.: Send menus home, post menu on school website.	Start of school year (ongoing)	Keep a copy		
Submit public release to media	Annually	Completed by OPI		
Request two sanitation inspections.	Annually	Record date of both inspections in MAPS / Post inspection report in publicly visible place		
Report Food Safety Inspections requested and received in SY22-23 in MAPS under Applications>Food Safety Inspections.	November 10	MAPS		
Complete Civil Rights training with all school nutrition program staff.	Annually	Keep for records using OPI documentation form		
Post 'And Justice for All' Civil Rights poster in the Cafeteria.	Annually	Posted		
NEW: Update all program materials, including home page of program website, with 2022 Nondiscrimination Statement.	Website: by August 3rd, 2022 Update New Materials: By September 2023	Posted		
**Complete Paid Lunch Equity Tool to assess paid meal prices.	Annually	Keep electronic copy		
*Assess compliance with non-program revenue requirements through the USDA Non-Program Revenue Tool or OPI Lost Revenue Tool.	Annually	Keep electronic copy		
Ensure all items sold during the school day meet Smart Snacks regulations.	Ongoing	Keep documentation of all items sold to students		
*Implement and review a district-wide charging policy.	Annually	Keep a copy		
Review the Wellness Policy.	Annually	Keep most recent copy		
Assess the Wellness Policy & communicate results to public.	Once every 3 years	Keep recent assessment		
Review and update HACCP plan. Have a copy at each school site where meals are served.	Annually	Keep a copy		
Develop and implement district-wide food service procurement policy & procedures.	Annually	Keep a copy of documentation		
Post Breakfast & Lunch Signage in the Cafeteria advising of what constitutes a reimbursable meal for Offer vs. Serve.	Annually	Posted		
Conduct outreach for the nearest Summer Food Service Program site, regardless of your district's participation.	Annually	Keep a copy		
USDA Foods order for SY2023-24: Submit 'Annual Survey' in MAPS and if participating in DOD Fresh, designate entitlement dollar amount to set aside. *An email notification will be sent when the Survey is available in MAPS.*	February	Info is recorded in MAPS. Print for reference if desired		
Other				
Private Schools: Submit Annual Financial Report	August	MAPS		

* Indicates requirements that may not apply to RCCIs/CEP schools.
** District will be notified if PLE needs to be completed.

All needed documents to complete these tasks can be found in MAPS > Applications > Document Library.
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Annual Procurement Checklist

Task to Complete	Explanation	Documentation	Date Completed	Who
Procurement Preparation				
All sponsors must have a documented procurement plan, written standards of conduct that meet regulations, and written protest procedures.	7 CFR 210.21 2 CFR 200.318	Written procurement procedures		
Determine if your school district/sponsor has a more restrictive small purchase threshold than the state. MT Small Purchase Threshold: $80,000 Local Small Purchase Threshold:_____	Sponsors must follow the most restrictive threshold.	Written procurement Procedures		
Micro-Purchase Requirements ($0-$10,000): may be awarded without soliciting competitive price quotes if SFA considers price to be reasonable.				
Establish & Document Micro-Purchase Threshold. SFA may establish a threshold higher than set in FAR of $10,000 if self-certifies, up to $50,000. The self-certification must include a justification, clear identification of the threshold, and supporting documentation	SFA is responsible for determining and documenting an appropriate micro-purchase threshold (up to $50,000 if SFA self-certified) 2 CFR 200.320(a)(1)(iv).	Written procurement procedures		
Maintain purchasing documentation to verify that all procurements are below 10,000 (or below the SFA's self-certified threshold).	Ensure federal funds are allowable, reasonable, and allocable 2 CFR 200.320(a).	Invoices Receipts		
To the maximum extent practicable, program operators should distribute micro-purchases equitably among qualified suppliers (2 CFR 200.320(a)(1)(ii))	May be awarded without soliciting competitive price quotes if the program operator "considers the price to be reasonable based on research.	Written procurement procedures		
Small Purchase Requirements ($10,000 or less - $80,000): Must compare prices, SFA decides who to ask for prices, specifications required.				
Document Small Purchase Procedures.	Include plan for purchasing, who you are purchasing from, how often procurements are made.	Written procurement procedures		
Maintain procurement documentation to verify that all procurements are less than $80,000.	Ensure federal funds are allowable, reasonable and allocable.	Specifications Solicitation documents Purchase orders Invoices Receipts Contract terms (if applicable)		
At least 2 or more price quotes obtained for each procurement.	Competition is an essential part of the procurement process.	Include date of price quote. May use documented calls, store flyers, e-mails, solicitations, etc. Small Purchase Cost Comparison Worksheet		
Formal Purchase Requirements ($80,000+): Invitation for Bid (IFB) or Request for Proposal (RFP)				
Document Formal Purchase Procedures.	IFB, RFP	Written procurement procedures		
Maintain procurement documentation.	Specific process must be followed for proper formal procurement.	Competitive Sealed Bid/IFB Process Documentation Competitive Proposal/RFP Process Documentation		

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Civil Rights Training Documentation Form	
Date:	
Presenter:	
Attendees: (list names)	
Topics Covered: (A copy of the training may be attached)	Check the box if the OPI training was used ☐

Complete annually with all SNP & SFSP food service staff and volunteers.
Keep this form on file at the School Food Authority (SFA).

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SY2023-24 Household Application for Free and Reduced Price School Meals

Complete one application per household. Please use a pen (not a pencil).

APPLY ONLINE:
RETURN TO (School/District Name):
ADDRESS:

STEP 1 | List ALL children, infants, and students up to and including grade 12. Attach another sheet of paper if you need space for more names.

List ALL children in the household. Do not forget to list infants, children attending other schools, children not in school, and children not applying for benefits. This includes children not related to you in your household.

Child's First Name	MI	Child's Last Name	Grade	Check all that apply	Foster Child	Migrant	Runaway	Homeless	
					☐	☐	☐	☐	If you checked any of these boxes, please refer to the Application Instruction's Step 1: Part C & Part D.
					☐	☐	☐	☐	
					☐	☐	☐	☐	
					☐	☐	☐	☐	

STEP 2 | Do any household members (including you) participate in: SNAP, TANF, or FDPIR?

○ **NO** ➔ Go to STEP 3.   ○ **YES** ➔ Write case number here and proceed to STEP 4.   **CASE NUMBER (NOT EBT NUMBER):**

Write only one case number in this space.

STEP 3 | List ALL household members and income for each member (before taxes and deductions)

A. All Adult Household Members (Anyone who is living with you and shares income and expenses, even if not related, including you.)

List all Adult Household Members not listed in STEP 1 (including yourself) even if they do not receive income. For each Household Member listed, if they receive income, report total gross income (before taxes and deductions) for each source in whole dollars (no cents) only. If they do not receive income from any source, write '0'. If you enter '0' or leave any fields blank, you are certifying (promising) that there is no income to report.

Name of Adult Household Members (First and Last)	Earnings from Work	How often received?					Public Assistance, Child Support, Alimony	How often received?				Pensions, Retirement, Social Security, SSI, VA Benefits, All Other	How often received?			
		Weekly	Every 2 Weeks	2x Month	Monthly	Annual		Weekly	Every 2 Weeks	2x Month	Monthly		Weekly	Every 2 Weeks	2x Month	Monthly
	$	○	○	○	○	○	$	○	○	○	○	$	○	○	○	○
	$	○	○	○	○	○	$	○	○	○	○	$	○	○	○	○
	$	○	○	○	○	○	$	○	○	○	○	$	○	○	○	○
	$	○	○	○	○	○	$	○	○	○	○	$	○	○	○	○
	$	○	○	○	○	○	$	○	○	○	○	$	○	○	○	○

Total Household Members (Children and Adults) [　]

Last Four Numbers of Social Security Number of Primary Wage Earner or other Adult Household Member (If Applicable) [　][　][　][　]

Check if no Social Security Number ☐

Please see application's back for list of income sources.

B. Child Income

Sometimes children in the household earn or receive income.
Include the TOTAL income (before taxes and deductions) received by ALL children listed in STEP 1 here.

Child Income	How often received?				
	Weekly	Every 2 Weeks	2x Month	Monthly	Annual
$	○	○	○	○	○

STEP 4 | Contact information and adult signature.   **RETURN COMPLETED FORM TO YOUR CHILD'S SCHOOL:**   Insert school address here

"I certify (promise) that all information on this application is true and that all income is reported. I understand that this information is given in connection with the receipt of Federal funds, and that school officials may verify (confirm) the information. I am aware that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted under applicable State and Federal laws."

Print Name of Adult Signing the Form | Signature of Adult | Today's Date

Mailing Address (if available) | City | State | Zip | Phone (optional) | Email (optional)

Return completed form to your child's school.

SOURCES AND EXAMPLES OF INCOME
For additional information on income, please refer to the instructions that accompany this application.

Sources of Income			Examples of Income for Children
Earnings from Work	**Public Assistance/Alimony/ Child Support**	**Pensions/Retirement/ All other sources of income**	• A child has a regular full or part-time job where they earn a salary or wages
• Salary, wages, cash bonuses, tips, commissions • Net income from self-employment (farm or business) **If you are in the U.S. Military:** • Basic pay and cash bonuses (do NOT include combat pay, FSSA, or privatized housing allowances) • Allowances for off-base housing, food, and clothing	• Unemployment benefits • Workers' compensation • Supplemental Security Income (SSI) • Cash assistance from State or local government • Alimony payments • Child support payments • Veterans benefits • Strike benefits	• Social Security/Disability (including railroad retirement and black lung benefits) • Private Pensions or disability benefits • Income from trusts or estates • Annuities • Investment income • Earned interest • Rental income • Regular cash payments from outside household	• A child is blind or disabled and receives Social Security benefits • A parent is disabled, retired, or deceased, and their child receives Social Security benefits • A friend or extended family member regularly gives a child spending money • A child receives regular income from a private pension fund, annuity, or trust

OPTIONAL
Children's ethnic and racial identities. This information is kept confidential and may be protected by the Privacy Act of 1974.

We are required to ask for information about your children's race and ethnicity. This information is important and helps to make sure we are fully serving our community. Responding to this section is optional and does not affect your children's eligibility for free or reduced price meals.

Ethnicity (check one): ☐ Hispanic or Latino (A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish Culture or origin, regardless of race)   ☐ Not Hispanic or Latino

Race (check one or more): ☐ American Indian or Alaska Native   ☐ Asian   ☐ Black or African American   ☐ Native Hawaiian or Other Pacific Islander   ☐ White

Return this completed form to your child's school. *Do <u>not</u> mail, fax, or email completed applications to the U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights.

DO NOT FILL OUT
For school use only.

Annual Income Conversion: Weekly × 52, Every 2 Weeks × 26, Twice a Month × 24, Monthly × 12. Do not annualize income to determine eligibility unless more than one income frequency is listed.

Total Income	How often?					Household size		Eligibility		
	Weekly	Every 2 Weeks	2x Month	Monthly	Annual			Free	Reduced	Denied
_____	○	○	○	○	○	_____	Categorical Eligibility ☐	○	○	○

Determining Official's Signature _____   Date _____   Confirming Official's Signature _____   Date _____   Verifying Official's Signature _____   Date _____

Use of Information Statement

The contact information below is solely to file a complaint of discrimination

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity. Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: **https://www.usda.gov/sites/default/files/documents/ad-3027.pdf,** from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

*MAIL:	U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights 1400 Independence Avenue, SW Washington, D.C. 20250-9410	FAX: EMAIL:	(833) 256-1665 or (202) 690-7442; or program.intake@usda.gov	*Do not mail applications to this address, only complaints of discrimination.

Return completed form to your child's school.

This institution is an equal opportunity provider.

INCOME ELIGIBILITY GUIDELINES
(Effective from July 1, 2023 through June 30, 2024)

If more than one income frequency is reported, all income should be converted to a yearly figure before a determination is made. The conversion formula is as follows:

Monthly x 12
Twice a Month x 24
Every Two Weeks x 26
Weekly x 52

Household Size	Free Meals – 130%					Reduced-Price Meals – 185%				
	Annual	Monthly	Twice a Month	Every Two Weeks	Weekly	Annual	Monthly	Twice a Month	Every Two Weeks	Weekly
1	$18,954	$1,580	$790	$729	$365	$26,973	$2,248	$1,124	$1,038	$519
2	$25,636	$2,137	$1,069	$986	$493	$36,482	$3,041	$1,521	$1,404	$702
3	$32,318	$2,694	$1,347	$1,243	$622	$45,991	$3,833	$1,917	$1,769	$885
4	$39,000	$3,250	$1,625	$1,500	$750	$55,500	$4,625	$2,313	$2,135	$1,068
5	$45,682	$3,807	$1,904	$1,757	$879	$65,009	$5,418	$2,709	$2,501	$1,251
6	$52,364	$4,364	$2,182	$2,014	$1,007	$74,518	$6,210	$3,105	$2,867	$1,434
7	$59,046	$4,921	$2,461	$2,271	$1,136	$84,027	$7,003	$3,502	$3,232	$1,616
8	$65,728	$5,478	$2,739	$2,528	$1,264	$93,536	$7,795	$3,898	$3,598	$1,799
For each additional family member, add	$6,682	$557	$279	$257	$129	$9,509	$793	$397	$366	$183

Prepared by the Office of Public Instruction - PO Box 202501, Helena, MT 59620-2501

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School Nutrition Programs:
Free & Reduced-Price Verification Instructions SY23-24

Verification is the process by which schools confirm the eligibility of a sample of approved free and reduced-price meal applications. **Schools will report the verification results and October eligibility data on the School Food Authority (SFA) Verification Collection Report in** [MAPS](#) (under the 'Application' menu). Please carefully read through these instructions to ensure reporting accuracy. Additional instructions can be found in the [USDA's Eligibility Manual](#).

Important Verification Dates:

October 1	(1) Record Oct 1st Application Counts (2) Calculate Sample Size (3) Send Household Notification Letters
October 31	Record Student Counts as of October 31 (section 4 column B).
November 15	Deadline to collect household documentation/complete the verification process.
November 30	Submit Verification Report in MAPS starting Nov 1. Report Deadline November 30.

October 1   (1) Record Application Counts (2) Calculate Sample Size (3) Send Household Notification Letters

Section 4 Column A - Record the categories of applications on file as of October 1st to determine the pool of applications subject to verification

Student counts (column B) will be captured as of October 31.

4-1 Tip: Categorically Free Eligible – Record the number of categorically free applications (SNAP, TANF, FDPIR or Foster Care categories) only if NOT Directly Certified from DCA and therefore included in the pool subject to verification. Applications confirmed as directly certified must be counted in Section 3 only as proof of their eligibility source program has already been confirmed and therefore not subject to verification. Do not duplicate counts. Direct Certification supersedes a paper application and SNAP-direct certs are given top preference.

3% Sample Size – Calculate the Number of Applications to Verify

The applications listed in section 4 are subject to verification because proof of eligibility has NOT been established.

- Total the number of **applications** in section 4, column A.
  - This is the number of applications in the pool subject to the verification process.

- Multiply the total number of applications in in section 4 by .03 (3%).
  - **Round all decimals up to the next whole number.**
  - This calculation equals the number of applications you will need to verify.

3% Calculation - Example

Approved Applications as of Oct 1st

Section 4	Students approved as FREE or REDUCED PRICE eligible through a household application	**ALL SFAs collecting applications must report Section 4**	A. Number of Applications
		4-1: Approved as categorically FREE Eligible: *Based on those providing documentation (e.g. a case number for SNAP, TANF, FDPIR on an application)*	1
		4-2: Approved as FREE eligible: *Based on household size and income information*	24
		4-3: Approved as REDUCED PRICE eligible: *Based on household size and income information*	17

Total number of Applications in section 4 (Column A) multiplied by 3% =

In this example 2 applications should be randomly selected for the verification process

42
X **00.03 (3%)**
= **1.26 (2)** (round all decimals up)

School Nutrition Programs:
Free & Reduced-Price Verification Instructions SY23-24

Method of Verification - Item #33 of MAPS Sponsor Application

Dependent upon on the percent of household applications that responded to last year's verification process.
If during last year's verification process:

- **80% or more of the household's responded**, your district may conduct the Random **(Alternate One)** method and randomly select 3% of the approved applications on file to verify.

- **Less than 80% of the household's responded**, your district is required to conduct the Error Prone **(Standard)** method and select the 3% of applications to verify from those considered "error-prone".

    o Error-Prone Applications – Applications within $100 per month of the Income Eligibility Guidelines.

   Draw the 3% verification sample from applications subject to verification (section 4)

Send Verification Letters
- Before sending verification letters, a Confirmation Review must be conducted to ensure accuracy of the initial determination.

    o Must be a person other than the official who made the initial eligibility determination
    o Document the confirmation review by the "confirming signature" line of the selected application

- Send the "We Must Check Your Application" letter to selected household(s)
    Tip: Use the Verification Activity Tracker worksheet to document the process

- **Nov 15 - Deadline to gather/confirm household's proof of eligibility responses**

    o Households have 10 days to reply
    o If no reply, follow-up contact at least 1x (document)
        ▪ Districts with low response rates will be subject to error-prone method the following year

- Send the prototype "We Have Checked Your Application" letter to households

    o If verification results in higher benefits (e.g., changing from reduced-price to free category), the change is effective immediately and must be implemented no later than 3 operating days later
    o If verification results in reduced or terminated meal benefits, households must be given 10 calendar days' written advance notice of the change (continue benefits for 10 calendar days)

- Document household responses/nonresponses in section 5-8 on the Verification form

October 31   Record Student Counts

Report the number of approved **students** as of October 31st for each category (Sections 1 – 4 Column B) and record counts on the Verification form. An updated direct certification report should be reviewed on or just prior to October 31st.

1-1: Enrolled Student Counts – Enter the number of (A.) OPI School Sites and (B.) Total enrolled students as of **Oct 31.**

1-2: Residential Child Care Institutions (RCCIs) must enter the number of sites and students enrolled for each type. Then check items 3-1, 5-1 and save changes to submit the report.

Section 2: This section is applicable to CEP schools only

2-3: CEP Sites – Enter the number of (A.) Schools and (B.) Students participating in CEP
If ALL school sites are CEP, check items 3-1 & 5-1 and you are finished.
If only SOME of the school district's sites participate in CEP, report as follows:

- Section 3-2: Report SNAP-only direct certification data for the schools NOT participating in CEP/Provision 2
- Report remaining fields and all other applicable Sections for schools NOT participating in CEP/Provision 2

School Nutrition Programs:
Free & Reduced-Price Verification Instructions SY23-24

Section 3-B: Student Counts - Directly Certified as of Oct 31

Students in Section 3 are NOT subject to verification because proof of eligibility has already been confirmed. Students can only be counted as being in one category

3-1: Leave 3-1 blank (unless *all* school sites are CEP/Provision 2 or RCCI)

3-2 B: Students SNAP Directly Certified in DCA *(SNAP Direct Cert supersedes all other eligible categories)*
When a student is Directly Certified through DCA that eligibility supersedes all other information on file (such as household application or letter from the SNAP agency) and the student should be counted as directly certified. If a student is directly certified with SNAP and another program (e.g. Foster Care), SNAP should be given preference. Directly Certified students are not subject to the verification process as proof of eligibility has already been confirmed. Students can only be counted in one category.

Item 3-2 will auto-populate the number of SNAP DC from DCA as of Oct31 in the MAPS system. Please review for accuracy.

3-3 B: Students Directly Certified by other source categories: TANF, FDPIR, homeless, migrant, runaway & foster (proof of participant eligibility confirmed by source or through DCA system). *This item will also auto-populate a count from DCA.*

3-4 B: Categorically Free Students by household submission of <u>SNAP letter only</u>. SNAP Letters that were also validated in the DCA system as directly certified should be counted in 3-2 B as SNAP directly cert only (do not count in both places).

		ALL SFAs must report Section 3 or check box 3-1 if applicable 3-1: ☐ Check the box only if all schools and/or RCCIs in the SFA were not required to perform direct certification with SNAP *(i.e. NON BASE year Provision 2/3 for all schools)*	**B. Number of FREE Students**
Section 3	Students approved as FREE eligible NOT subject to verification	3-2: Students directly certified through Supplemental Nutrition Assistance Program (SNAP): Do *not* include students certified with SNAP through the letter method.	97
		3-3: Students directly certified through other programs: Include those directly certified through Temporary Assistance for Needy Families (TANF), Food Distribution Program on Indian Reservations (FDPIR), or Medicaid (if applicable); those documented as homeless, migrant, runaway, foster, Head Start, Pre-K Even Start, or non-applicant but approved by local officials. DO NOT include SNAP students already reported in 3-2.	11
		3-4: Students certified categorically FREE eligible through SNAP letter method: Include students certified for free meals through the family providing a letter from the SNAP agency.	0

Section 4-B: Student Counts – Categorical/Income Free & Reduced as of Oct 31

4-1 B: Categorically Free Students - Application listing a Case Number *only* (SNAP, TANF, FDPIR or Foster Care)
Students reported as Categorically Free have NOT been confirmed as Directly Certified in DCA and are subject to the verification process because proof of eligibility has not been confirmed by source records.
Categorically Free Students that have been confirmed in DCA are considered Directly Certified and should be recorded in section 3.

4-2 B: Report the number of **Free Income based Students**

4-3 B: Report the number of **Reduced-Price Students**

		ALL SFAs collecting applications must report Section 4	**A. Number of Applications**	**B. Number of Students**
Section 4	Students approved as FREE or REDUCED PRICE eligible through a household application	4-1: Approved as categorically FREE Eligible: Based on those providing documentation (e.g. a case number for SNAP, TANF, FDPIR on an application)	1	3
		4-2: Approved as FREE eligible: Based on household size and income information	24	35
		4-3: Approved as REDUCED PRICE eligible: Based on household size and income information	17	30

School Nutrition Programs:
Free & Reduced-Price Verification Instructions SY23-24

Section 5 – Verification Process & Results

5-1: Only check the box if **all** school sites are exempt from the verification process. Types of schools exempt to the Verification process include CEP, Provision 2, Residential Child Care Institutions and Milk only.

5-2: Household documentation and correspondence must be completed by November 15th.
If you are unable to complete the verification process by November 15, the district must submit a written request to this deadline. See the Verification Deadline Extension Request form online.

5-3: For further information, see page 2 for the Method of Verification details and reference the Eligibility Manual

5-4: Only report the number of Error-Prone Applications on **if during last year's verification process,** less than 80% of the households responded and your district is required to conduct the Alternate One/Error-Prone method.

5-5: Report the number of Applications Verified
- This number should reflect the calculation on page 1
  - Total of Section 4 Column A multiplied by 3% - round all decimals up
- This number should also equal the total number of verified applications in Section 5-8

ALL SFAs must report Section 5 or check box 5-1 if applicable	
5-1: ☒ Check the box if ALL schools and/or RCCIs are exempt from verification *(see instructions for list of exemptions)*. If 5-1 is checked, no further reporting in Section 5 is required.	

5-2: Was verification performed and completed?	5-3: Type of Verification process used:
☒ Yes, completed by November 15th ☐ Yes, completed after November 15th ☐ No, verification was NOT performed or the process was not completed.	1. ☐ Standard (Lesser of 3% or 3,000 error-prone) 2. ☒ Alternate one (Lesser of 3% or 3,000 selected randomly) 3. ☐ Alternate two (Lesser of 1% or 1,000 error prone applications PLUS lesser of one-half of one percent or 500 applications with SNAP/TANF/FDPIR case numbers)

If 1 or 3 is checked in **5-3**, report **5-4**. If 2 is checked in **5-3**, enter	5-4: Total ERROR PRONE applications: *Report all applications as of October 1st considered error prone*		5-5: Number of applications selected for verification sample:	2

5-6: Direct Verification – Using records from public agencies to verify proof of income and/or program participation
From the application(s) *selected for the verification process, if none* were validated as directly certified in DCA or confirmed with agency records, check the box.

5-7: Confirmed through Direct Verification - Only report counts in this section if the *applications selected for the verification process* were directly verified/confirmed with agency records (in DCA).

		A. Number of Applications	B. Number of Students
ALL SFAs must report 5-7 or check box 5-6 if applicable 5-6: ☐ Check the box if direct verification was not conducted in the SFA, (i.e. not one of the schools and/or RCCIs in the SFA performed direct verification). **If 5-6 is checked, skip 5-7.**			
Report if FREE and/or REDUCED PRICE eligibility is confirmed through	5-7: Confirmed through		

School Nutrition Programs:
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Submit the SFA Verification Collection Report online through MAPS. **The electronic Verification Report will be available in MAPS November 1st-30th. Paper Versions Will Not Be Accepted.** The PDF/paper version of the form is available as a worksheet only.

Locate the Verification Report in MAPS:

1. Select the 'Application' menu **2.** Then click on the **'Verification Report'**	
3. Click **Modify** Next to SY 2023-2024	

School Nutrition Programs:
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4. Fill out all applicable fields

5. Click **Save** at the bottom of the form when done.

MAPS Online Verification Form Features

The system pre-fills some of the items for you such as the number of directly certified students auto-populates a count from the DCA system. Edit checks have been encorporated into the MAPS Verification Report form to prompt correction of errors.

Contact Alie Wolf at aliew@mt.gov or (406) 459-5394 with any further verification questions.

This institution is an equal opportunity provider.

Self-Review: Meal Counting and Claiming System
Annual review for accuracy of the Point of Service system at each school under jurisdiction of the SFA.

Complete before FEBRUARY 1 each school year.

The purpose of this review is to ensure the site's claim for reimbursement is based on an acceptable meal counting system that yields the actual number of reimbursable free, reduced-price and paid breakfast and lunch meals served for each day of operation.

If any of the questions below are answered "NO," the SFA must ensure the school implements corrective action and conduct a follow up on-site review to determine if corrective action resolved the problem(s) within 45 days. Documentation of corrective action and follow up should be recorded at the end of this form.

School Name	
Self-Review Date	
Name of Reviewer	
Meal Service (Circle One)	Breakfast Lunch

Meal Counting System	YES	NO
1. Meal counts must be taken where complete meals are served to children. **Is the POS count taken at the end of the serving line, where a determination can be made that a reimbursable meal has been selected?** NOTE: If counts are taken at the front of the line, a staff person must monitor the end of the serving line to ensure all required components are selected for each student meal claimed for reimbursement. The following methods for taking meal counts are NOT acceptable: • attendance records or morning meal counts • tray counts • cash converted to meals • free, reduced or paid meals backed out of total meal count • counting/claiming number of meals ordered rather than number of meals served		
2. Is the person responsible for monitoring meals correctly identifying reimbursable meals?		
3. Is someone trained as a backup for the monitor and the meal counter?		

7 CFR 210.8(a)(1) SFAs
7 CFR Part 210.2 RCCIs

4. Is there a method for recording non-reimbursable meals (for example, meals not meeting meal pattern requirements, second student meals, adult meals, ala carte purchases, etc.) to distinguish them from reimbursable meals?		
5. Are meals charged to student accounts claimed on the day the meals are served?		
6. Are meals served to student workers charged and claimed in the student's correct category of approval (free, reduced, paid)? If school does not utilize student workers, skip this question.		
7. Do meals taken on field trips meet meal pattern requirements and is a POS meal count taken to ensure a reimbursable meal is selected by each student? If "NO" explain:		
8. Does the cashier know the policy for handling:		
a) Lost, stolen, and misused tickets/meal accounting numbers?		
b) Meals served to visiting students?		
c) Non-reimbursable (incomplete) meals?		
9. Did the person(s) responsible for monitoring meals receive training on meal pattern requirements and Offer versus Serve provision (if utilized at this school) this year?		
10. Are daily meal counts (for all serving lines, serving periods, etc.) accurately totaled, recorded and reported?		
11. Does the meal counting and claiming system prevent overt identification (any action that openly identifies children for free or reduced meal benefits in the school lunch or breakfast program:		
a) In the type of meal coding system used?		
b) By disallowing students to share/borrow tickets or meal account numbers in the cafeteria line?		
c) By assuring that if a school uses a checklist, the checklist contains the names of all students, not only those students who receive free and reduced meals, and there is no color coding or indication of a student's category of eligibility on the checklist? If school does not utilize a checklist, skip this question.		
12. Is there a backup system in place if/when the primary counting system is not available (for example, a paper roster)?		

Claim for Reimbursement	YES	NO
1. Is the school's POS count used to determine the school's claim for reimbursement? If "NO" explain:		
2. Was a daily edit check performed by the SFA prior to submitting the monthly claim for reimbursement? The edit check requires daily meal counts are compared to the number of eligible students in each category multiplied by an attendance factor. If daily meal counts are greater than the number of students eligible in each category multiplied by the attendance factor, the reason must be documented. Document reasoning here:		
3. Do the monthly meal count summary and the total of the daily meal counts match the meal counts reported in the monthly claim for reimbursement? If "NO" explain:		
Note: The following two questions are for all SFAs <u>except</u> for SFAs on Provision 2 or 3 in non-base years, CEP, or RCCIs with only residential children		
4. Is a current eligibility list kept up-to-date and used by the meal counting system to provide an accurate daily count of reimbursable meals **by category** (free, reduced price, paid)?		
5. If applicable according to 7 CFR 220.11(d) are comparisons of daily free, reduced price and paid meal counts against data which will assist in the identification of breakfast counts in excess of the number of free, reduced price and paid meals served each day to children eligible for such meals completed?		
Readily Observable General Areas	YES	NO
Were any issues readily observed in relation to resource management?		
a) Maintenance of the Nonprofit School Food Service Account?		
b) Paid Lunch Equity?		
c) Revenue from Non-program Foods?		

7 CFR 210.8(a)(1) SFAs
7 CFR Part 210.2 RCCIs

d) Indirect Costs?		
Were any issues readily observed in other general areas?		
a) Free and Reduced Price Process – including verification, notification, and other procedures		
b) Civil Rights		
c) Reporting and Recordkeeping		
d) Food Safety		
e) Competitive Food Service		
f) Water		
g) Professional Standards		
h) SBP and SFSP Outreach		
i) Local School Wellness Policies		
j) Other		

Corrective action to be taken:

_____

_____

_____

_____

Corrective action will be implemented by:

Name	
Title	
Date	

FOLLOW UP Self-Review: Meal Counting and Claiming System

Name of Reviewer		
Date Conducted		

Corrective action implemented:

_____

_____

_____

Professional Standards

What School Nutrition Program Employees (that's YOU!)
need to know about Professional Standards

opi.mt.gov

School Nutrition Program Position	Required Training Hours
Program Director This person oversees all aspects of the School Nutrition Program in their district. This includes administering, planning, directing, assessing, implementing, and evaluating the program.	12 annual training hours
Program Manager Large districts that have a centralized kitchen and satellite kitchens often have a Program Manager for each satellite kitchen to oversee food production and service.	10 annual training hours
Program Staff working ≥ 20 hours/week. This is anyone that is employed to work in the School Nutrition Program.	6 annual training hours
All Program Staff working < 20 hours/week.	4 annual training hours
Any training that lasts 15 minutes or longer counts! "Teachable Moments" in your kitchen can be counted towards Professional Standards training hours.	

Training for Professional Standards is categorized into these 4 Key Areas

Nutrition: Menu Planning, Nutrition Education, General Nutrition.

  Example: How to read the ingredients list to confirm a menu item is whole grain rich.

Operations: Food Production, Serving Food (offer vs serve), Cashier and Point of Service, Purchasing/Procurement, Receiving and Storage, Food Safety and HACCP.

  Example: Learn about how much should be offered and how much should be served to make a reimbursable meal.

Administration: Free and Reduced Price Meal Benefits, Program Management, Financial Management, Human Resources and Staff Training, Facilities and Equipment Planning.

Communications and marketing: Communications, Marketing.

  Example: Share a Smarter Lunchroom technique you learned and want to implement in your School Nutrition Program.

Documentation of training hours must be available for Administrative Review.

An easy to use Professional Standards Training Tracking Tool is available here:

http://www.fns.usda.gov/school-meals/professional-standards

Hiring Standards for **NEW** School Nutrition Program Directors

Student Enrollment	Required Qualifications
≥10,000 Students Billings Public Schools Great Falls Public Schools	**Must have at least one of the following:** ☐ Bachelor's degree, or equivalent educational experience, with academic major in specific areas.* ☐ Bachelor's degree in any academic major **and** at least 5 years experience in management of school nutrition programs.
2,500-9,999 Students Belgrade Public Schools Bozeman Public Schools Butte Public Schools Helena Public Schools Kalispell Public Schools Missoula County Public Schools	**Must have at least one of the following:** ☐ Bachelor's degree, or equivalent educational experience, with academic major in specific areas.* ☐ Bachelor's degree in any academic major **and** at least 2 years of relevant experience in school nutrition programs. ☐ Associate's degree or equivalent educational experience, with academic major in specific areas,* **and** at least 2 years of relevant experience in school nutrition programs.
≤ 2,499 Students 51 Sponsors in Montana	**Must have at least one of the following:** ☐ Bachelor's degree, or equivalent educational experience, with academic major in specific areas*. ☐ Bachelor's degree in any academic major, **and** at least one year of relevant experience in school nutrition programs. ☐ Associate's degree or equivalent educational experience, with academic major in specific areas,* **and** at least one year of relevant experience in school nutrition programs. ☐ High school diploma (or GED) **and** at least 3 years of relevant experience in school nutrition programs.
< 500 Students 199 Sponsors in Montana	OPI School Nutrition Programs can approve a candidate who meets the educational standards as listed for schools with ≤ 2,499 students, but has less than 3 years of experience. **Schools must complete and submit the Request to Hire Form for approval from OPI to hire a School Food Service Director that does not meet the new hiring standards.**
* Specific majors/areas of concentration: food and nutrition, food service management, dietetics, family and consumer sciences, nutrition education, culinary arts, business, or a related field.	

Revised August 2023

Save the Date
OPI School Nutrition Programs

Webinar Wednesdays

2:00 - 3:00 pm | Beginning August 16, 2023

See the [OPI Continuing Ed. Calendar](#) for more details
To attend the webinars, click on the following [Zoom link](#)

2023 Fall Workshops

Please [register](#) to attend an in-person workshop:

Virtual · August 30	Missoula · September 20
Billings · September 13	Great Falls · September 27
Miles City · September 15	

MONTANA OPI SCHOOL NUTRITION PROGRAMS

School Year 2023-2024 Training Schedule and Continuing Education Opportunities

>> Zoom link for Webinar Wednesdays <<
https://mt-gov.zoom.us/j/82046853519

Activity	Location	Time	Date	Professional Standards Codes/Hours
August				
Harvesting Helena (Farm to School Workshop, 9am-4pm, Helena)	Helena Registration Required	9AM-4PM	Thursday, August 10, 2023	*2000/2400/**6***
Webinar Wednesday: Online Free/Reduced Applications & New Medicaid for Determining Officials	Zoom	2-3 PM	Wednesday, August 16, 2023	*3000/3100/**1***
Webinar Wednesday: Direct Certification Application (DCA) & Medicaid for Determining Officials	Zoom	2-3 PM	Wednesday, August 23, 2023	*3000/3100/**1***
***Virtual* SNP Fall Workshop:** Back to School Basics for FSD & Administrative Staff	Zoom	9AM - 4PM	Wednesday, August 30, 2023	*1000/2000/3000/4000/**6***
September				
Fall Workshops: Please register to attend one. Back to School Basics for Food Service Directors and Administrative Staff. Topics to include Free/Reduced Benefits Process, Administrative Requirements, Resource Management, Procurement, School Wellness Policy, Meal Patterns, Production Records, Professional Standards, SNP Checklist Items, Administrative Review, and other topics.				
Regional SNP Fall Workshop Registration Link	Billings	9AM–4PM	Wednesday, September 13, 2023	*1000/2000/3000/4000/**6***
Regional SNP Fall Workshop Registration Link	Miles City	9AM–4PM	Friday, September 15, 2023	*1000/2000/3000/4000/**6***
Regional SNP Fall Workshop Registration Link	Missoula	9AM–4PM	Wednesday, September 20, 2023	*1000/2000/3000/4000/**6***
Regional SNP Fall Workshop Registration Link	Great Falls	9AM–4PM	Wednesday, September 27, 2023	*1000/2000/3000/4000/**6***
Webinar Wednesday: Opportunity for Local Food Grant for Schools	Zoom	2-3 PM	Wednesday, September 6, 2023	*2000/2400/3300/**1***

Updated August 2023

Webinar Wednesday: Quick Website Tips for Finding What you Need (School Nutrition, Team Nutrition, Farm to School website)	Zoom	2-3 PM	Wednesday, September 13, 2023	
Webinar Wednesday: Farm to School Crunch Time	Zoom	2-3 PM	Wednesday, September 20, 2023	*1100/2000/2400/1*
Montana Food for MT Schools (A Local Procurement training and meetup event for and Local Producers & Schools)	Great Falls Registration Required	1:30-4:30PM	Thursday, September 28, 2023	*2400/3*
October				
Webinar Wednesday: Verification for Determining Officials	Zoom	2-3 PM	Wednesday, October 4, 2023	*3000/3100/1*
Webinar Wednesday: Production Records Tips & Tricks	Zoom	2-3 PM	Wednesday, October 11, 2023	*1100/2000/1*
Webinar Wednesday: Fresh Fruit and Vegetable Program	Zoom	2-3 PM	Wednesday, October 18, 2022	*1100/2100/3200/1*
Culinary Training (Two-day culinary training. Priority given to schools participating in MSMC)	TBD Registration Required	TBD	Thursday & Friday, October 19 & October 20	2000/2100/**8**
Webinar Wednesday: Breakfast Meal Pattern & OVS	Zoom	2-3 PM	Wednesday, October 25, 2023	1100/1300/2200/**1**
Montana Food for MT Schools (A Local Procurement training and meetup event for and Local Producers & Schools)	Missoula Registration Required	1:30PM-4:30PM	Wednesday, October 25, 2023	*2000/2400/3*
Harvest of the Month in the Flathead (Farm to School Workshop)	Columbia Falls Registration Required	9AM-4PM	Saturday, October 28, 2023	*2000/2400/6*
November				
Webinar Wednesday: After School Snack Program	Zoom	2-3 PM	Wednesday, November 1, 2023	*1100/1300/2100/2600/1*
Webinar Wednesday: Montana Harvest of the Month	Zoom	2-3 PM	Wednesday, November 8, 2023	*1100/1200/1300/2100/2400/1*
Webinar Wednesday: Procurement Policy/Procedures	Zoom	2-3 PM	Wednesday, November 15, 2023	*2000/2400/1*
Webinar Wednesday: Lunch (NSLP) Meal Pattern & Offer vs. Serve	Zoom	2-3 PM	Wednesday, November 29, 2023	*1000/1100/2200/1*
December				
Webinar Wednesday: Get to Know the Details of the Smart Snack Policy	Zoom	2-3 PM	Wednesday, December 6, 2023	*1200/1300/3000/1*
Webinar Wednesday: Scratch Cooking Success Strategies	Zoom	2-3 PM	Wednesday, December 13, 2023	*1100/2100/1*
January				

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Webinar Wednesday: Community Eligibility Provision (CEP)	[Zoom](#)	2-3 PM	Wednesday, January 17, 2024	*3100/1*
Webinar Wednesday: USDA Foods/DoD Fresh	[Zoom](#)	2-3 PM	Wednesday, January 24, 2024	*1100/2400/2430/1*
Webinar Wednesday: Jump into School Nutrition Basics on the OPI Learning Hub	[Zoom](#)	2-3 PM	Wednesday, January 31, 2024	*1000/1200/1300/1*
February				
Webinar Wednesday: Maintenance of Fund-12	[Zoom](#)	2-3 PM	Wednesday, February 7, 2024	*3000/3300/1*
Webinar Wednesday: School Wellness Policy & Success Strategies	[Zoom](#)	3-4 PM	Wednesday, February 14, 2024	*1000/1200/1300/3000/1*
Webinar Wednesday: Discover the Roadmap to Quality School Meals	[Zoom](#)	2-3 PM	Wednesday, February 21, 2024	*1000/2000/3000/4000/1*
Webinar Wednesday: Q&A Meal Modifications/Managing Food Allergens Through HACCP	[Zoom](#)	2-3 PM	Wednesday, February 28, 2024	*2000/2600/3400/1*
March				
Webinar Wednesday: Summer Food Service Program	[Zoom](#)	2-3 PM	Wednesday, March 6, 2024	*1000/2000/3000/4000/1*
Webinar Wednesday: Fresh Fruit & Vegetable Reallocation	[Zoom](#)	2-3 PM	Wednesday, March 13, 2024	*1000/2000/3000/4000/1*
Webinar Wednesday: Standardized Recipes	[Zoom](#)	2-3 PM	Wednesday, March 27, 2024	*1000/1100/2000/1*
April				
Webinar Wednesday: Adding Indigenous Foods to your School Menu	[Zoom](#)	2-3 PM	Wednesday, April 3, 2024	*1000/1100/1*
Webinar Wednesday: Summer Food Service Program	[Zoom](#)	2-3 PM	Wednesday, April 10, 2024	*1000/2000/3000/4000/1*
May				
TBD				
June				
MT School Nutrition Association (MTSNA) Summer Conference	Billings [Registration Required](#)	N/A	June 24 – 27, 2024	*1000/2000/3000/4000/16*

Training Resources
- [SNP Webinar Wednesday Resources Google Drive](#)
- [SNP Professional Standards Training Resources](#)
- [Professional Standards Training Code Topics List](#)

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OFFICE OF PUBLIC INSTRUCTION
STATE OF MONTANA

Putting Montana Students First A+

ADULT MEAL PRICES SCHOOL
YEAR 2023-2024

Revenue from the National School Lunch and Breakfast Programs cannot be used to subsidize adult meals. The purpose of federal assistance is to provide nutritious meals to school children to safeguard their health and well-being.

If the school district subsidizes meals for teachers, administrators, custodians and other adults, the subsidy should be identified as an employee benefit and revenue source in the school foodservice budget.

The cost of meals served to adults directly involved in the operation and administration of the School Nutrition Programs (those preparing and serving food) may be supported by the foodservice operation. **Any meal served to an adult (whether supported by the foodservice or not) may not be claimed for reimbursement or counted toward the USDA Foods entitlement.**

The adult lunch price is required to be at least the total of the federal reimbursement for free students plus value of USDA Foods, plus state match. The adult breakfast price uses only the federal free reimbursement rate.

|	Adult Lunch Price	Adult Breakfast Price
Federal Free Reimbursement	$4.2500	$2.28
Value of USDA Foods	$0.3650	
State Match	$0.0585	
Total	**$4.6735**	**$2.28**

Prices are based on portions sizes served to children. If larger portions are served to adults, the meal should be priced according to cost.

The price of adult meals may be lower than the recommended reimbursement price noted above. If not using the recommended adult price as noted above, school/sponsor must maintain documented meal costs on file. Schools/sponsors must add revenue back into their non-profit Food Service fund covering the total costs of adult meals (including food, labor, and non-food supplies). This can be done by either charging the adult the full cost of the meal or by adding revenue from another funding source (such as the school general fund). If a school district decides to subsidize meals for teachers, administrators, custodians and other adults, the subsidy should be identified as an employee benefit and as a source of revenue in the School Foodservice fund.

For questions, please contact School Nutrition Programs at 406-444-2501.

Source Citation: FNS Instruction 782-5 Rev. 1, Dated June 6, 1988, U.S. Department of Agriculture, Food and Nutrition Service

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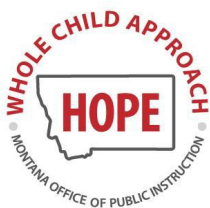
Resources for a Successful School Year in 2023-2024

Four Ways to Start Your School Year with Montana Team Nutrition

1. CHECK OUT NEW RESOURCES AND CONNECT WITH PEERS

- **New Harvesting Montana Recipes -** Six recipes featuring Montana grown foods, barley, beets, bison, lentils, and sweet cherries are available to download on our website.
- **Roadmap to Serving High Quality School Meals -** Download this free, online tool to determine future goals and access resources to enhance school meal quality.
- **Continuing Education Courses** – Training topics including school nutrition program overview and the Dietary Guidelines for Americans are available on the OPI Learning Hub. Create an account and search 'Montana School Meal Certificate Training Program' to enroll.
- **MT Lunchline Email Listserv** – Join by emailing Erin Turner at erin.turner@mt.gov

2. PLAN FUN PROMOTIONS TO MARKET YOUR SCHOOL MEALS PROGRAM!

- **October 10 2023 –** Join in Montana Crunch Time to celebrate National Farm to School Month by crunching into any locally grown or raised food wherever you are – school, work, or play! Be sure to make your crunch count! Register by October 31 to help Montana win the 2023 Mountain Plains Crunch off!
- **October 9-13, 2023 –** School Nutrition Association National School Lunch Week
- **March 4-8, 2024 –** School Nutrition Association School Breakfast Week

3. PARTICIPATE IN YOUR DISTRICTS SCHOOL WELLNESS POLICY INITIATIVE

Utilize resources such as a school wellness newsletter, policy implementation guide, and assessment tool on the Montana Team Nutrition School Wellness Webpage. A free Local School Wellness Policy online (1 hour) class on is available on the OPI Learning Hub. Search "local school wellness policy" to enroll.

Learn More

WEB
www.montana.edu/team
nutrition

FACEBOOK
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Grow Farm to School This School Year!

1. ### REGISTER FOR MONTANA FOOD FOR MONTANA SCHOOLS

Montana Food for Montana Schools is a local procurement training and meetup event for producers and Schools. Montana Team Nutrition Program, Montana Office of Public Instruction, and Abundant Montana will host one event in Great Falls on September 28th and another event in Missoula on October 25th. Find more information and register here.

2. ### REGISTER FOR MONTANA HARVEST OF THE MONTH

Montana school and afterschool programs can now register for the **Montana Harvest of the Month program** for the 2023-24 school year! The Montana Harvest of the Month program showcases Montana grown and raised foods in Montana schools and communities. Participating schools will receive a free packet of materials, as well as guides, additional resources, and training. Summer squash is back after a long break and featured in July.

For more information or to register your school or afterschool program for free visit: Montana Harvest of the Month.

3. ### WANT TO SERVE MONTANA BEEF ON YOUR MENUS?

Learn successful ways to serve Montana beef at the Montana Beef to School webpage.

4. ### ACCESS ADDITIONAL RESOURCES

- Montana Farm to School website
- Montana Farm to School Facebook and Instagram pages
- Montana Farm to School Annual Report

Contact Jay Stagg, Montana Farm to School Coordinator at jay.stagg@montana.edu or (406) 994-5996 for more information.

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