

## Training Checklist for Administrative Staff

Use this checklist for training sponsor administrative staff, including office assistants, clerks, bookkeepers, secretaries, area supervisors, and monitors.

1. General explanation of the Program:

- A. Purpose of the Program
- B. Site eligibility
- C. Record keeping requirements
- D. Organized site activity
- E. Meal requirements
- F. Nondiscrimination compliance

2. How the Program operates:

- A. How meals will be provided
- B. Meal service procedures
  - tray line
  - pre plated
  - family style
- C. The delivery schedule, if applicable
- D. What records are kept and what forms are used
- E. Site boundaries
- F. SED visits
- G. DOH visits
  
- H. Is site congregate or non-congregate? (SED must approve non-congregate meal service)

3. Special duties of Monitors (include if separate training is not held for monitors):

- A. How to conduct site visits and reviews
- B. Sites for which each monitor is responsible
- C. Monitoring schedule
- D. Reporting procedures
- E. Office procedures

## **Training Checklist for Monitors**

1. Sites for which they will be responsible
2. Conducting site visits and reviews
3. Monitoring schedules
4. Reporting and record keeping procedures
5. Follow-up procedures
6. Office procedures
7. Local sanitation and health laws
8. Civil rights
9. Reporting racial/ethnic data
10. Personal Safety Precautions, if necessary
11. Are meals provided as approved? Congregate vs. Non-congregate. (Non-congregate only allowed at sites approved by SED)

## Training Checklist for Site Staff

1. General explanation of the Program
  - A. Purpose of the Program
  - B. Site eligibility
  - C. Importance of accurate records especially meal counts
  - D. Importance of organized activities at sites
  
2. How sites operate:
  - A. For vended sites:
    1. Types of meals to be served and the meal pattern requirements (provide planned menus)
    2. Delivery schedules (give exact times)
    3. Adjustments in the number of meals delivered
    4. Facilities for storing meals
    5. Who to contact about problems (name and phone number)
    6. Approved level of meal service
  
  - B. For self-preparation sites:
    1. Meal pattern requirements
    2. Inventory (use inventory forms)
    3. Meal adjustments (use production records)
    4. Meal preparation adjustments
  
  - C. Is site congregate or non-congregate? (SED must approve non-congregate meal service)
  
3. Record keeping requirements
  - A. Daily record keeping requirements
  - B. Delivery receipts (provide sample forms)
  - C. Seconds, leftovers and spoiled meals
  - D. Daily labor – actual time spent on food service and time and attendance records
  - E. Collection of daily record forms
  - F. Maintain copies of meal service forms

4. Monitors' responsibilities (use site visit and review forms)
  - A. Duties and authority
  - B. Introduce monitors and discuss areas of assignment
5. Civil Rights requirements (use Site Supervisor's Guide)
6. Other policies/issues
  - A. What to do in inclement weather and alternate service areas
  - B. How to handle unauthorized adults trying to eat meals
  - C. How to handle discipline
  - D. Review equipment, facilities, and materials available for recreational activities
  - E. Review trash removal requirements
  - F. Discuss corrective action
  - G. Nutrition education



