



District Name:

**Local School Wellness Policy  
ACTION PLAN for SY 2016-17  
Developed by California Project LEAN**

*Below are recommended action steps in the form of a checklist for districts to consider and complete to comply with USDA Final Rule deadline of June 30, 2017.*

*Check each box and provide date when numbered action steps are completed.*

**Recommendations**

On July 29, 2016, the USDA Food and Nutrition Service (FNS) finalized regulations to create a framework and guidelines for written wellness policies established by Local Education Agencies (LEAs). The final rule requires LEAs to revise Local School Wellness Policy (LSWP) during School Year 2016-2017. **LEAs must fully comply with the requirements of the Final Rule (FR) by June 30, 2017.** (To access USDA Final Rule: [https://www.fns.usda.gov/sites/default/files/tn/LWPsummary\\_finalrule.pdf](https://www.fns.usda.gov/sites/default/files/tn/LWPsummary_finalrule.pdf)).

**Wellness Leadership (Immediately- before June 30, 2017)**

**LSWP Leadership.** The FR requires LEAs to identify to the public the position or title of the LEA or school official(s) responsible for the LSWP oversight. Methods could include posting the information on the LEA Web page or mailing letters to families. LEAs have discretion designating the responsible person(s) for leadership. The USDA recommends that the contact information, such as phone numbers or e-mails, also be included in the public disclosure, but is not required. LEAs can locate this requirement in 7 CFR, Section 210.30(c)(4).

<input type="checkbox"/> <b>Date Completed:</b>	<p>1. Administration will identify and confirm wellness policy leadership of one or more LEA and/or school official(s) who have the authority and responsibility to ensure each school complies with the policy. <b>This may be the single most important task to happen immediately.</b></p> <p>Name(s):</p> <p>Position(s):</p> <p>Contact Information:</p>
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**Comments:**

Source: California Project LEAN, a program of the Public Health Institute. [www.CaliforniaProjectLEAN.org](http://www.CaliforniaProjectLEAN.org)

**(Re)Convene District Wellness Committee (DWC)- Establish DWC infrastructure (Immediately – Ongoing)**

**Public Involvement in the LSWP.** As defined by the FR, 7 CFR, Section 210.30(c)(5), LEAs must allow parents, students, school food authority representatives, teachers of physical education, school health professionals, the school board, school administrators, and members of the general public to participate in the development, implementation, and periodic review and update of the LSWP. LEAs are also encouraged to include Supplemental Nutrition Assistance Program Education (SNAP-Ed) coordinators or educators on the LSWP committee, as appropriate. LEAs, however, have discretion in exactly how they implement this requirement. LEAs must include a plan for involving the required stakeholders in the written LSWP.

<input type="checkbox"/> <b>Date Completed:</b>	<p>2. Take inventory of active and participating members. Identify who is missing from this group and invite to participate such as the general public and the school community, including parents, students, and representatives of the school food authority, teachers of physical education, school health professionals, SNAP-Ed partners, school board members, and school administrators. Be sure to identify the appropriate person(s) to do the inviting.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Invite letter(s)</li> <li>• Committee roster</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>3. Develop workgroups based on wellness policy components (e.g., Nutrition Workgroup led by Child Nutrition and School Health Official/Nurse; Physical Activity/Education Workgroup led by Athletic Director; Communication Workgroup led by District Administration; Fundraising/Marketing Workgroup led by District PTA President, etc.). For each workgroup, identify and confirm a lead and several wellness committee members. Workgroups will meet (e.g., via email, phone, or in person, if applicable) outside of the monthly District Wellness Committee meetings and will provide updates as needed.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Workgroup rosters</li> </ul>
<b>Comments:</b>	

Source: California Project LEAN, a program of the Public Health Institute. [www.CaliforniaProjectLEAN.org](http://www.CaliforniaProjectLEAN.org)

<input type="checkbox"/> <b>Date Completed:</b>	<p>4. Ensure wellness committee correspondence, including wellness committee meeting notices, minutes and agendas are sent from the Superintendent or appropriate Assistant Superintendent.</p>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>5. Host monthly meetings at a time and place convenient for most members to participate. (Consider adjusting to quarterly meetings once the wellness policy is revised and Board-approved and an implementation plan for SY 2017-18 has been developed, approved, and is being implemented.)</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Meeting agendas and minutes</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>6. Ensure either the Superintendent or appropriate Assistant Superintendent facilitates each district wellness committee meeting.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Meeting agendas and minutes</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>7. Identify district staff person who will provide the agenda and take and share out meeting minutes.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Meeting agendas and minutes</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>8. District Administration will add the wellness policy as a standing agenda item for every meeting with District Leadership, Department Chairs, and Principal Forums. It is during these meetings that District Administration will provide updates as well as ask for input into the wellness policy revision process. Once the wellness policy is Board-approved, District Administration will continue to include the wellness policy as an ongoing agenda item as a means to discuss implementation and evaluation district-wide.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Meeting agendas and minutes</li> </ul>
<b>Comments:</b>	

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**Wellness Policy Assessment and Revision Process (Immediately – June 30, 2017)**

<input type="checkbox"/> <b>Date Completed:</b>	<p>9. With Wellness Committee members, assess strength and comprehensiveness of the <i>current</i> district wellness policy by utilizing the WellSAT (Wellness School Assessment Tool). This process will help provide where the wellness policy can be strengthened to meet current and proposed district practices. (To access the free online WellSAT tool, visit <a href="http://www.wellsat.org">www.wellsat.org</a>). The WellSAT will provide a score once assessment is complete.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• WellSAT score</li> </ul>
<p><b>Comments:</b></p>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>10. Utilize the District Wellness Committee Workgroups to assess and revise their assigned wellness policy component. Identify timeline for review and approval for each wellness policy component.</p> <p><i>Note:</i> Be sure to incorporate language via the WellSAT into wellness policy, which would support an increased score for low-scoring components.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Workgroup agenda, minutes, and/or timeline</li> </ul>
<p><b>Comments:</b></p>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>11. Revise wellness policy to address Final Rule (FR) provisions. Check off the following FR provisions as committee agreed-upon language is included into the wellness policy.</p> <p><input type="checkbox"/> <b>Wellness Leadership.</b> The FR requires LEAs to identify to the public the position or title of the LEA or school official(s) responsible for the LSWP oversight. Methods could include posting the information on the LEA Web page or mailing letters to families. LEAs have discretion designating the responsible person(s) for leadership. The USDA recommends that the contact information, such as phone numbers or e-mails, also be included in the public disclosure, but is not required. LEAs can locate this requirement in 7 CFR, Section 210.30(c)(4).</p> <p><input type="checkbox"/> <b>Public Involvement in the LSWP.</b> As defined by the FR, 7 CFR, Section 210.30(c)(5), LEAs must allow parents, students, school food authority representatives, teachers of physical education, school health professionals, the school board, school administrators, and members of the general public to participate in the development, implementation, and periodic review and update of the LSWP. LEAs are also encouraged to include Supplemental Nutrition Assistance Program</p>

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Education (SNAP-Ed) coordinators or educators on the LSWP committee, as appropriate. LEAs, however, have discretion in exactly how they implement this requirement. LEAs must include a plan for involving the required stakeholders in the written LSWP.

**Public Notification.** The FR retains the requirement that LEAs must notify households on an annual basis of the availability of the LSWP and provide information that would enable interested households to obtain additional details. The FR provides LEAs flexibility to determine the most effective method of providing this notification within their communities. LEAs can locate this requirement in 7 CFR, Section 210.30(d)(2).

**Nutrition Promotion and Education, Physical Activity, and Other School-based Activities.**

The FR requires the LEA to include in their LSWP specific and measurable goals for nutrition promotion and education, physical activity, and other school-based activities that promote student wellness. In developing these goals, LEAs must review and consider evidence-based strategies and techniques. At minimum, the LEA is required to review Smarter Lunchrooms Movement tools and strategies. LEAs can locate this requirement in 7 CFR, Section 210.30(c)(1).

**Nutrition Guidelines for All Foods.** The FR clarifies that the LSWP must include nutrition guidelines that are consistent with the federal meal standards and competitive food and beverage requirements for all food and beverage items available on the school campus during the school day. This includes food or beverage items given away or sold. **The LEA has discretion in establishing food and beverage standards for items offered but not sold to students on the school campus during the school day including foods and beverages provided at classroom parties, school celebrations, or offered as rewards and incentives.** LEAs simply need to have a policy in place that addresses food and beverage items provided in school, but not made available for sale. LEAs can locate this requirement in 7 CFR, Section 210.30(c)(2).

**Policies for Food and Beverage Marketing.** The FR clarifies that school marketing of food and beverage items must meet competitive food and beverage standards. Additionally, the FR clarifies what is and is not subject to policies for food and beverage marketing in schools.

The FR defines marketing as advertising and other promotions in schools. LEAs are required to include marketing policies in their LSWP. The LSWP marketing policies must only allow the marketing of those food and beverage items that meet the smart snack guidelines. LEAs must apply the marketing policies to products on the exterior of vending machines, posters, menu boards, coolers, trash cans, and other food service equipment, as well as cups used for beverage dispensing.

The FR does not require LEAs to immediately replace menu boards, coolers, tray liners, beverage cups, and other food service equipment with depictions of

noncompliant products or logos, or remove or replace an existing scoreboard on a sports field or in a gymnasium. However, as LEAs review new contracts and consider replacing durable equipment, decisions should reflect the applicable marketing guidelines established in the LEA LSWP. LEAs can locate this requirement in 7 CFR, Section 210.30(c)(3).

- Implementation, Assessments, and Updates.** The FR requires each LEA to assess compliance with its LSWP within three years of their update and to make this assessment available to the public. The assessment must include, at a minimum, compliance with the LSWP, how the LSWP compares to model LSWPs, and progress made in attaining the goals of the LSWP. The FR removes the requirement for LEAs to annually report progress of LSWPs for each school. However, LEAs are required to annually notify the public about the content of the LSWP and any updates to the policy. LEAs can locate this requirement in 7 CFR, Section 210.30(e)(2).

The LEA can use a variety of methods to assess compliance with the LSWP with schools in their jurisdiction and determine progress toward benchmarks, goals, and objectives. Developing an LSWP with measurable objectives, and realistic annual benchmarks will help when it is time to evaluate progress. LEAs can access various resources on the USDA School Nutrition Environment and Wellness Resources Web page at <http://healthymeals.nal.usda.gov/school-wellness-resources>.

*Note:* Consider aligning your LSWP triennial assessment with your district Local Control Accountability Plan (LCAP) process.

- Recordkeeping.** The FR establishes that records retained by the LEAs must include, at a minimum, the written LSWP, documentation demonstrating compliance with community involvement, documentation of the every three years assessment, and documentation to demonstrate compliance with the public notification requirements. LEAs can locate this requirement in 7 CFR, Section 210.30(f).

Documentation demonstrating compliance with community involvement requirements may include a copy of the invitation to participate located on the LEA's Web page. Documentation demonstrating compliance with the every three-year assessment may include a copy of the report regarding the results of the assessment and the date the assessment was conducted. Documentation of compliance with the public notification requirements may include a copy of the LEA's Web page where the LSWP has been posted.

Supporting documents may include:

- Wellness policy components addressing the above required topics.

Comments:

<input type="checkbox"/> <b>Date Completed:</b>	<p>12. Superintendent’s Office to compile all revised and workgroup-approved wellness policy components based on Workgroup input.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Draft revised wellness policy inclusive of all workgroup components</li> </ul>
<b>Comments:</b>	
<b>Date Completed:</b>	<p>13. As a District Wellness Committee, review and approve newly revised wellness policy.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Final revised wellness policy</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>14. Superintendent to submit revised wellness policy to the School Board by May 2017 for approval by the June 30, 2017 deadline.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Board agenda and minutes</li> <li>• Board-approved Wellness Policy</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>15. Begin developing district-wide implementation plan for SY 2017-18.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Workgroups’ implementation planning drafts</li> <li>• District Wellness Committee implementation plan</li> </ul>
<b>Comments:</b>	

**Assessment (Immediately – June 30, 2017. If not SY 2016-17, then begin SY 2017-18)**

<input type="checkbox"/> <b>Date Completed:</b>	<p>16. Complete the following School Health Index (SHI) modules. Be sure to identify appropriate personnel/wellness committee members and/or utilize established wellness committee workgroups to complete the modules. Assessment should be done at each school site. Results for completing the SHI will serve two purposes: 1) as an assessment of current wellness activities and 2) a guide to identify and prioritize implementation for SY 2017-18.</p> <p><i>Note:</i> California Department of Education will confirm that each district must have completed the SHI by June 30, 2020. (To see School Health Index for both Elementary and Middle/High School, visit: <a href="http://www.cdc.gov/healthyschools/shi/index.htm">http://www.cdc.gov/healthyschools/shi/index.htm</a>)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Module 1: School Health and Safety Policies and Environment</li> <li><input type="checkbox"/> Module 2: Health Education</li> <li><input type="checkbox"/> Module 3: Physical Education and Other Physical Activity Programs</li> <li><input type="checkbox"/> Module 4: Nutrition Services</li> </ul> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Completed SHI Modules</li> </ul>
<b>Comments:</b>	

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**School Health Committee Infrastructure (Begin SY 2017-18 – Ongoing)**

Implementation of the district wellness policy occurs at each school site level. To ensure the policy is being implemented, it is recommended that school site wellness committees are established.

<input type="checkbox"/> <b>Date Completed:</b>	<p>17. District Administration will inform each school site principal about the wellness policy and ask of them to identify a group that works best for their school site to address implementation of wellness policy activities.</p> <p><i>Note:</i> This may look differently across the district as some school sites may address implementation of the wellness policy via various groups such as the School Site Council, ELAC, PTA/PTO, or other established groups.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Correspondence between district administration and principals</li> <li>• School Health Committee rosters, agenda, minutes</li> </ul>
<p><b>Comments:</b></p>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>18. A representative from each school site wellness committee (e.g., principal, site council, PTO parent, and/or teacher) will be invited to participate in the monthly District Wellness Committee meetings. This will ensure cross-sharing of information, including successes, challenges, and other pertinent information related to the implementation of the wellness policy.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• District Wellness Committee roster</li> </ul>
<p><b>Comments:</b></p>	

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**Communicating the Wellness Policy (Immediately – Ongoing)**

The USDA Final Rule requires that LEAs must make available to the public the wellness policy, including any updates to and about the wellness policy, on an annual basis.

<input type="checkbox"/> <b>Date Completed:</b>	<p>19. The District Wellness Committee will establish a Communication Workgroup to be led by a district administrator, preferably the person responsible for districtwide communication, and inclusive of various committee members, such as school site personnel and/or school community volunteers as they will help disseminate updates and notification to the public regarding school wellness policy information districtwide and across school sites.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Communication Workgroup roster</li> </ul>
<p><b>Comments:</b></p>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>20. The Communication Workgroup will provide updates and notification to the public. The Communication Workgroup will develop and conduct wellness policy presentations to various groups in the school community, including school site representatives conducting such presentations within their own school sites (e.g., school site staff meetings, PTA/PTO groups, DLAC/ELAC meetings, ASB, student clubs, etc.) to inform and create support.</p> <p><i>Note:</i> Consider the Assistant Superintendent, one principal, an active parent, and a community partner as the group that conducts these presentations.</p> <p>Key points for the Communications Workgroup to address:</p> <ul style="list-style-type: none"> <li>• The wellness policy is a federal mandate</li> <li>• The district supports healthy school environments</li> <li>• Implementing a strong wellness policy supports student health and academic achievement</li> <li>• District/School site successes</li> <li>• Invitation to participate in district and/or school site wellness committees and engage in implementation (and evaluation) activities</li> </ul> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Contact log</li> <li>• PowerPoint presentations</li> <li>• Meeting flyers, agendas and/or minutes</li> </ul>
<p><b>Comments:</b></p>	

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<input type="checkbox"/> <b>Date Completed:</b>	<p>21. The Communications Workgroup will develop communication/infographic pieces-- in various languages that reflect the demographics of the district-- for wellness policy successes and agreed-upon wellness policy components (e.g., wellness policy overall summary, nutrition- classroom celebrations, fundraising, rewards/incentives, school meal promotion, physical activity opportunities, etc.).</p> <p>Communication pieces will be shared through various channels that include: district and individual school site websites, Back-to-School, Open House, and other district/school events, and School Board and other district/school meetings.</p> <p><i>Note:</i> Consider developing a communication piece on the upcoming revision process.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Communication/infographic pieces (in multiple languages)</li> <li>• District/school site website snapshots, flyers, etc.</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>22. The District Wellness Committee will develop and conduct surveys to assess the school community about their knowledge of, support for, and engagement in the wellness policy.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Surveys and results</li> </ul>
<b>Comments:</b>	
<input type="checkbox"/> <b>Date Completed:</b>	<p>23. The Superintendent and/or appropriate Assistant Superintendent and members of the District Wellness Committee will provide periodic (monthly, quarterly, and/or yearly) updates to the School Board.</p> <p>Supporting documents may include:</p> <ul style="list-style-type: none"> <li>• Reports</li> <li>• Board agenda and minutes</li> </ul>
<b>Comments:</b>	

## Summary

The recommendations outlined above with checkboxes serve to help guide the work proposed for this school year. The first five steps are required to be completed by June 30, 2017. The remaining steps will support ongoing wellness policy implementation and assessment.

- 1. Establish local school wellness policy (LSWP) leadership of one or more LEA or school official(s) who have the authority and responsibility to ensure each school complies with the policy. Make sure the position or title of the LSWP leader(s) is made available to the public by June 30, 2017. Some suggestions for public notification include posting the information on the LEA Web page or sending out the information through district correspondence.
- 2. (Re)Convene your District Wellness Committee to include a variety of invited stakeholders (including parents, students, and representatives of the school food authority, teachers of physical education, school health professionals, SNAP-Ed personnel, school board members, and school administrators). Be sure to collect documentation of community involvement.
- 3. Continue to inform and update the public about the content, implementation, and assessment of your wellness policy. June 30, 2017, LEAs must update the public annually. By SY 2019–20, LEAs must conduct and report on the triennial assessment of wellness policies. Keep a contact log as documentation.
- 4. Revise the wellness policy based on the WellSAT score and USDA Final Rule provisions.
- 5. Obtain Board approval of the updated wellness policy by June 30, 2017 as required by USDA Final Rule.
- 6. Establish School Site Wellness Council infrastructure.
- 7. Complete the following School Health Index (SHI) modules. Be sure to identify appropriate personnel/wellness committee members and/or utilize established wellness committee workgroups to complete the modules. Results for completing the SHI will serve two purposes: 1) as an assessment of current wellness activities and 2) a guide to identify and prioritize implementation for SY 2017-18. (See School Health Index for both Elementary and Middle/High School attached or visit: <http://www.cdc.gov/healthyschools/shi/index.htm>)
  - Module 1: School Health and Safety Policies and Environment
  - Module 2: Health Education
  - Module 3: Physical Education and Other Physical Activity Programs
  - Module 4: Nutrition Services

*This recommended action plan was developed by California Project LEAN, a program of the Public Health Institute. For more information or support in advancing school wellness policy efforts, including implementation planning and monitoring, please contact Katherine Hawksworth at [Katherine.Hawksworth@phi.org](mailto:Katherine.Hawksworth@phi.org) or call (925) 708-7027, or visit our website at [www.CaliforniaProjectLEAN.org](http://www.CaliforniaProjectLEAN.org) for additional resources.*

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*Resources:*

1. USDA LSWP Final Rule  
USDA webpage: <https://www.fns.usda.gov/school-meals/fr-072916c>  
Summary: [https://www.fns.usda.gov/sites/default/files/tn/LWPsummary\\_finalrule.pdf](https://www.fns.usda.gov/sites/default/files/tn/LWPsummary_finalrule.pdf)
2. WellSAT 2.0 Toolkit: <http://wellsat.org/>
3. School Health Index:  
Elementary School: <https://www.cdc.gov/healthyschools/shi/pdf/elementary-total-2014.pdf>  
Middle/High School: <https://www.cdc.gov/healthyschools/shi/pdf/middle-high-total-2014.pdf>

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