

K-12 Nutrition Director Checklist

Preparing an Equipment Business Case for Approval

Use this checklist to confirm you have documented the operational, financial, and compliance justification for proposed kitchen equipment investments tied to updated nutrition standards.

1. Policy & Compliance Readiness

- I understand how the Dietary Guidelines impact USDA school meal standards
- I can explain how this equipment supports compliance (scratch cooking, fresh prep, storage, safety)
- I have identified any compliance risks if the equipment is not approved
- I know the timing of our next administrative review or audit

Notes:

2. Federal Funding Awareness

- I know our annual NSLP/SBP reimbursement amount
- I can explain how this equipment protects reimbursement eligibility
- I have documented how many meals are served daily/annually
- I can describe the financial risk of non-compliance

Notes:

3. Equipment & Facility Assessment

- I have identified which equipment is being replaced or supplemented
- I know the age and condition of existing equipment
- I have documented recurring repairs, downtime, or performance issues
- I have confirmed space, utilities, and infrastructure requirements

Notes:

4. Menu & Nutrition Alignment

- I have identified menu items limited by current equipment
- I can list menu items enabled by the proposed equipment
- I can link the equipment to USDA meal pattern components (produce, grains, proteins, etc.)
- I have validated that the equipment supports future menu plans

Notes:

5. Labor & Staffing Impact

- I have documented current staffing levels
- I have identified staffing challenges (vacancies, overtime, training limits)
- I can explain how this equipment improves efficiency without increasing staff
- I can describe workflow improvements (fewer steps, faster service)

Notes:

6. Food Cost, Waste & Efficiency

- I know our average food cost per meal
- I have identified waste or spoilage challenges
- I can estimate how the equipment reduces waste or improves yield
- I can explain how this supports long-term cost control

Notes:

7. Student Participation & Service Quality

- I know our current participation rate
- I have identified service challenges (speed, consistency, quality)

- I can explain how the equipment improves food quality or service flow
- I can describe potential participation or satisfaction improvements

Notes:

8. Safety & Risk Reduction

- I have identified staff safety concerns (lifting, burns, repetitive motion, etc.)
- I have documented any prior incidents or near-misses (if applicable)
- I can explain how the equipment reduces injury risk
- I can link safety improvements to operational continuity

Notes:

9. Equity & Consistency Across Schools

- I have identified schools lacking comparable equipment
- I can describe service or quality inconsistencies between sites
- I can explain how this investment promotes equitable student experiences

Notes:

10. Financial & Approval Preparation

- I have reviewed estimated cost ranges
- I have an attached vendor quote with specifications and pricing
- I have identified funding sources (capital, grants, nutrition funds)
- I can explain why this investment is needed now versus later

Notes:

11. Consequences of Inaction

- I can clearly explain what happens if the equipment is not approved
- I have documented compliance, funding, or operational risks of delay
- I can compare the cost of action vs. inaction

Notes:

12. Final Review Before Submission

- Executive summary completed
 - Business case completed
 - District-specific appendix completed
 - Quote attached
 - Checklist completed
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Support

This checklist is designed to support approval-ready documentation and may be used alongside proposals and quotes provided by **Aldevra**.