

# District-Specific Justification & Impact Summary

*(To Be Completed by the School District)*

This appendix supplements the equipment business case and provides district-specific context supporting approval of the proposed investment. All pricing, specifications, and installation details are provided in the attached quote.

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## 1. Equipment & Location Information

- Equipment being requested: \_\_\_\_\_
  - School(s) / Site(s) impacted: \_\_\_\_\_
  - Kitchen model (check one):  
 Elementary     Middle     High     Central / Commissary
  - Existing equipment being supplemented or replaced: \_\_\_\_\_
  - Age of existing equipment (years): \_\_\_\_\_
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## 2. Federal Funding Exposure

- Annual NSLP/SBP reimbursement received by district: \$ \_\_\_\_\_
- Average meals served per day: \_\_\_\_\_
- Percentage of meals reimbursed federally: \_\_\_\_\_ %
- Programs supported (check all that apply):  
 National School Lunch Program  
 School Breakfast Program  
 Afterschool / Summer Meals

### **Narrative (optional):**

Describe how this equipment supports continued eligibility for federal reimbursement:

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## 3. Compliance & Audit Considerations

- Date of most recent administrative review: \_\_\_\_\_

- Findings or corrective actions related to foodservice operations (if any):

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- Anticipated next review cycle: \_\_\_\_\_

**Narrative:**

Explain how the proposed equipment reduces compliance or audit risk:

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**4. Menu & Nutrition Standards Alignment**

- Menu items currently limited by existing equipment:

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- Menu items enabled by proposed equipment:

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- USDA meal pattern components supported (check all that apply):  
 Fruits    Vegetables    Whole Grains    Proteins    Dairy

**Narrative:**

Explain how the equipment supports execution of compliant menus:

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**5. Labor & Staffing Impact**

- Number of foodservice staff affected: \_\_\_\_\_
- Current staffing challenges (vacancies, overtime, training limits):

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- Estimated labor efficiency improvement (time, steps, or coverage):

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**Narrative:**

Describe how the equipment supports operations without increasing staffing levels:

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**6. Food Cost, Waste & Efficiency**

- Average food cost per meal: \$\_\_\_\_\_
- Known waste or spoilage challenges: \_\_\_\_\_
- Expected waste reduction or yield improvement: \_\_\_\_\_

**Narrative:**

Explain how the equipment helps control food costs or reduce waste:

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**7. Student Participation & Service Impact**

- Current meal participation rate: \_\_\_\_\_%
- Service challenges (speed, consistency, quality): \_\_\_\_\_
- Expected improvement (participation, satisfaction, consistency): \_\_\_\_\_

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**8. Safety & Risk Reduction**

- Known safety concerns (lifting, burns, repetitive motion, etc.): \_\_\_\_\_

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- Prior incidents or near-misses (if applicable): \_\_\_\_\_

**Narrative:**

Describe how the proposed equipment improves staff safety or reduces risk:

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**9. Equity & Consistency Considerations**

- Number of schools without comparable equipment: \_\_\_\_\_
- Operational or service inconsistencies between sites: \_\_\_\_\_

**Narrative:**

Explain how this investment promotes equity and consistent meal service:

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**10. Financial Summary & Approval Context**

- Estimated equipment cost range (planning purposes): \$\_\_\_\_\_
- Final quoted cost (see attached quote): \$\_\_\_\_\_
- Installation timeframe: \_\_\_\_\_
- Funding source (check all that apply):  
 Capital funds    Grant    Nutrition program funds    Other \_\_\_\_\_

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**11. Consequences of Not Proceeding****Narrative (required):**

Describe the operational, compliance, or financial impact if this investment is deferred:

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**12. Certification**

By completing this appendix, the district affirms that the information provided supports the operational, compliance, and financial justification for the proposed equipment investment.

- Prepared by (Name / Title): \_\_\_\_\_
- Date: \_\_\_\_\_

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## **Support & Documentation**

This appendix is provided with support from **Aldevra** and is intended to accompany equipment quotes, specifications, and installation documentation for approval and audit purposes.