

# GUIDANCE FOR SCHOOL WELLNESS POLICY TRIENNIAL ASSESSMENT

## WHAT IS A LOCAL SCHOOL WELLNESS POLICY?

A Local School Wellness Policy (LSWP) is a written document of board-approved policies that guide local education agency (LEA) efforts to establish a school environment that promotes students' health, well-being, and ability to learn by supporting healthy eating and physical activity. The LSWP requirement was established by the Child Nutrition and WIC Reauthorization Act of 2004 ([Public Law 108-265](#)) and further strengthened by the [Healthy, Hunger-Free Kids Act of 2010](#). All LEAs participating in the federal meal programs, such as the National School Lunch Program, must have a LSWP.

## WHAT IS A TRIENNIAL ASSESSMENT?

Each LEA participating in the federal school meal programs must complete an assessment of their LSWP at least once every three years. This requirement was established by the U.S. Department of Agriculture's (USDA) [Final Rule: Local School Wellness Policy Implementation Under the HHFKA of 2010](#).

## WHAT IS REQUIRED?

The USDA's [Final Rule: Local School Wellness Policy Implementation Under the HHFKA of 2010](#) requires LEAs to complete an assessment of their LSWP at least once every three years. This assessment must:

- measure the extent to which the LEA complies with the LSWP;
- describe how the language in the LEA's LSWP compares to the model wellness policy; and
- describe the LEA's progress toward meeting their LSWP goals.

LEAs must make the triennial assessment results available to the public. Most LEAs post their Triennial Assessments on their websites. State departments of education may review this documentation during the LEA's Administrative Review. For additional guidance, consult your state's department of education.

## REQUIRED STEPS AND RESOURCES

Table 1 summarizes the steps for completing the triennial assessment process. All required resources except for the district/school/institution's policy materials are available on the [WellSAT webpage](#). These include:

- District's LSWP and associated local procedures and regulations
- Wellness School Assessment Tool (WellSAT Policy)
- Wellness School Assessment Tool Interview (WellSAT Practice)
- Triennial Assessment: Summary of Findings

**Table 1. Steps for LSWP Triennial Assessment**

**Step 1 Complete the WellSAT Policy** (page 3)

- Compare LSWP to a model policy.
- Assess compliance of LSWP with federal requirements.

**Step 2 Complete the WellSAT Practice** (page 4)

- Assess compliance of district practices with federal requirements.
- Assess compliance with written LSWP.

**Step 3 Compare scores and summarize** (page 5)

- Document your progress toward meeting wellness goals.

**Step 4 Share triennial assessment report** (page 6)

- Share LSWP assessment with the public.
- Retain all worksheets for your next Administrative Review.

# STEP 1: COMPLETE THE WELLSAT POLICY

## TIME NEEDED

- 1-2 hours, depending on the policy’s length and complexity

## STAFF NEEDED

- Chair and members of the district wellness committee (contact the superintendent’s office for a list of wellness committee members)

## MATERIALS NEEDED

- District’s LSWP and associated local procedures/regulations
- The WellSAT Policy tool (you will need to register for an account if you do not already have one)

## PART A: COMPLETE THE WELLSAT POLICY

Download or print the district’s LSWP and associated local procedures/regulations. If the district works with the Connecticut Association for Boards of Education (CABE), CABE can help identify the district wellness policy. Most districts post their policies on their website. For tips on how to find your policy, review the “How to Find Your Policy” video at [wellsat.org/about](http://wellsat.org/about) or at <https://youtu.be/GGPKC3T-CSQ>.

Use the WellSAT Policy tool to assess the strength and comprehensiveness of your district’s policy compared to best practices. The tool can be completed online at [www.wellsat.org](http://www.wellsat.org). Download or print your scorecard. It will look like the image to the right.

**Policy Assessment: Triennial assessment 2 (9/2024)**  
District: None

Congratulations! You have completed the WellSAT. Check out your scorecard below. It contains details of how you scored on each item and section of the assessment. It also provides resources that will help you improve your district's school wellness policy.

Items with a rating of "0" (item not addressed in the policy) or "1" (general or weak statement addressing the item) can be improved by referring to the resource links next to the item. Multiple resources addressing school wellness policy topics are available online. To avoid duplicative information, we have included a short selection, rather than a comprehensive listing.

**Section 1. Federal Requirements**

FR1	Includes goals for nutrition education that are designed to promote student wellness.	2
FR2	Assures compliance with USDA nutrition standards for reimbursable school meals.	2
FR3	District/school/nutrition takes steps to protect the privacy of students who qualify for free or reduced-price meals.	2
FR4	Free drinking water is available during meals.	2
FR5	Ensures annual training for food and nutrition services staff in accordance with USDA Professional Standards.	0
FR6	Addresses compliance with USDA nutrition standards commonly referred to as Smart Snacks for all food and beverages sold to students during the school day. The school day begins at midnight the night before and goes until 30 minutes after the final bell.	0
FR7	Regulates food and beverages sold in a canteen.	2
FR8	Regulates food and beverages sold in vending machines.	2
FR9	Regulates food and beverages sold in school stores.	2
FR10	Addresses fundraising with food to be consumed during the school day.	1
FR11	Regulates food and beverages served at class parties and other school celebrations in elementary schools. Use NA if no elementary schools in district.	1

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*Image of a WellSAT Policy scorecard*

## PART B: CHECK WRITTEN POLICY FOR COMPLIANCE WITH FEDERAL REQUIREMENTS

Check the first section of your scorecard for the federal requirements (indicated by item numbers beginning with “FR”). Note any items missing from your written policy (i.e., score of “0”).

## **STEP 2: COMPLETE THE WELLSAT PRACTICE**

### **TIME NEEDED**

- 3-4 hours, depending on the number of people participating

### **STAFF NEEDED**

- District wellness committee members to administer the WellSAT Practice
- Participants: Food service director; district-level official; head of curriculum; health/nutrition education teacher; school principal; physical education teacher; classroom teacher

### **MATERIALS NEEDED**

- WellSAT Practice tool (available upon completion of the WellSAT Policy)

### **PART A: COMPLETE THE WELLSAT PRACTICE**

1. Click “Practice” under the “Edit” column on your WellSAT Dashboard. This link will only appear once all items of the WellSAT Policy are completed.
2. Determine who is best suited to answer each question in your district. Each item includes suggestions for the personnel most likely to be able to answer the question.
3. Complete the WellSAT Practice tool by gathering responses from the relevant personnel for each item. Ask all personnel who will need access to register for an account. From the assessment creator’s Dashboard, share the assessment by clicking on the three dots on the right side of the page, then select “Sharing.” Enter the email address of each person with whom you are sharing the assessment, then click the Share button. Repeat until the assessment has been shared with all necessary personnel.

### **PART B: CHECK WHETHER PRACTICES COMPLY WITH FEDERAL REQUIREMENTS AND YOUR POLICY**

1. Check your scorecard for the federal requirements (indicated by the prefix “FR”). Note any practices that are not currently in place (i.e., score of “0”).
2. Look at your WellSAT Policy and WellSAT Practice scores side by side. Highlight any practices that are written into your policy (i.e., score of 1 or 2), but are not in place in practice (i.e., score of 0).

## STEP 3: COMPARE SCORES AND SUMMARIZE

### TIME NEEDED

- 1-2 hours

### STAFF NEEDED





- District wellness committee members

### MATERIALS NEEDED

- WellSAT Triennial Assessment prompts (available upon completion of WellSAT Practice)

### WRITING NARRATIVES TO ACCOMPANY YOUR SCORESHEETS

- Respond to the prompts provided to create a narrative that describes what your district/school/institution found in your triennial assessment and any plans for improving policies and practices.
- There are seven sections to your Triennial Assessment summaries—five required and two optional.
  - Introduction (optional)
  - Sections for each of the four comparison outcomes shown below
  - Comparison with prior assessments
  - Conclusion (optional)

WellSAT Policy Score	WellSAT Practice Score	Comparison Outcome
2	2	 <b>Strong Policies and Aligned Practices</b> District/school/institution has a strong policy and is fully implementing practices that align with the policy
1	0	 <b>Create Practice Implementation Plan</b> District/school/institution has a strong or weak policy, but practice implementation is either absent or limited
2	1 or 0	
0 or 1	2	 <b>Update Policies</b> District/school/institution is fully implementing a practice but there is no or only weak language in the written policy, or the district/school/institution is partially implementing practices and there is no language in the policy
0	0 or 1	 <b>Opportunities for Growth</b> District/school/institution has either not addressed the topic in policy or practice; or has addressed the topic in a very limited way
1	1	

## STEP 4: SHARE YOUR ASSESSMENT REPORT

### TIME NEEDED

- 15 minutes

### STAFF NEEDED

- District wellness committee members
- District website administrator

### MATERIALS NEEDED

- Triennial Assessment Report

### MATERIALS TO SHARE

Ask your district's website administrator to post your triennial assessment report on your district website where families and community members can access it. **We recommend posting the entire PDF of your Triennial Assessment Report** (available by clicking "Triennial" under the scorecard column on your WellSAT dashboard). This surpasses the minimum requirements for the triennial assessment.

The following are the **minimum components** required to meet the federal requirements for the triennial assessment. However, please see instructions from your State Department of Education concerning posting requirements in your state.

- Post your completed **WellSAT Policy scorecard** to document that you have compared your policy to a model policy.
- Post the scores and summary for **Strong Policies and Aligned Practices** from your Triennial Assessment Report to document your areas of strength.
- Post the scores and summary for **Create Practice Implementation Plans** from your Triennial Assessment Report to document topics where your district is not compliant with elements of your LSWP and describe how the district will improve compliance.
- If there are **federal requirements in the Update Policies section of your Triennial Assessment Report**, **post these scores and the accompanying summary** to describe how the district will update its policy to include all federally required items. You may add plans for additional policy updates if desired.

- If there are **federal requirements** in the **Opportunities for Growth section** of your Triennial Assessment Report, **post these scores and the accompanying summary** to describe how the district will update its policy and practices to include all federally required items. You may add information about the LEA's future wellness goals here.
- Retain all materials from this assessment. The district's wellness committee can use these materials when revising the LSWP. Consult your State Department of Education to determine which documents must be made available during the next Administrative Review and how long these records must be kept.

## **CONGRATULATIONS!**

You have completed all steps of the Triennial Assessment.