

Introduction to the Triennial Assessment – Transcript

Hello, and thank you for joining our video series on the local school wellness policy triennial assessment for school meal sponsors. I'm joining you today from the University of Connecticut Rudd Center for Food Policy and Health.

In these videos, we will walk you through the steps to complete your triennial wellness policy assessment.

The USDA's Final Rule for Local School Wellness Policy Implementation requires all school food authorities to complete a review of their local school wellness policy every three years—that is, “triennially.”

The first triennial assessment was due June 30th, 2020, but the USDA issued waivers to extend this deadline due to the COVID-19 pandemic. This means that initial triennial assessment dates vary across several years. To determine when your district, school, or institution's next triennial assessment is due, check your records to find out when your first assessment was completed. Your next triennial assessment should be due three years after your initial assessment, but you should check with your state agency to verify.

The triennial assessment requires school food authorities to compare their school wellness policy to a model policy; assess their district, school, or institution's compliance in both policy and practice with: the federal requirements, and any additional requirements that are in their wellness policy; document their progress toward meeting wellness goals; and share the assessment with the public, and during their next administrative review.

Our goal with these videos is to break down these requirements into manageable pieces to help you complete the triennial assessment.

We have broken the process down into 4 steps. Detailed instructions and videos showing how to navigate the website are provided for each step.

First, you will need to compare your policy against model policy guidelines. To do this, you will complete the Wellness School Assessment Tool for Policy, or WellSAT Policy. This tool measures the strength and comprehensiveness of your written policies.

Then, you will need to assess the practices that are taking place within your schools. To do this, you will complete the WellSAT Practice, which is the sister tool to the WellSAT Policy.

Next, you will need to compare your written policy to the practices taking place in your schools and summarize these results. To do this, you will compare your WellSAT Policy

and WellSAT Practice scores. Then you will summarize your findings using prompts to assist you.

And finally, you will need to share your assessment with the public and at your next administrative review. To do this, you will download the report generated at the end of this process and post it to your district, school, or institution website. You will also need to retain your documents from this process for your next administrative review.

Keep in mind that each state sets its own requirements for completing the triennial assessment. You may be required to use forms provided by your state to report your results or to use specific tools to measure your policy and practices. You should follow your state agency's requirements, but feel free to use our process to assist you along the way.

Let's talk briefly about the Wellness School Assessment Tool. The WellSAT includes six sections, each of which is applicable to the triennial assessment.

These include four sections aligned with the Whole School, Whole Community, Whole Child (or WSCC) model, including Nutrition Environment & Services, Nutrition Education (part of the Health Education domain), Physical Education & Physical Activity, and Employee Wellness. It also contains items covering policies and practices required by federal regulations and topics relating to the integration and coordination of policies.

Now that we're familiar with the triennial assessment and WellSAT, let's get started with a quick introduction to how to use the online tool.

To access the WellSAT, go to wellsat.org using your internet browser.

If you want to view the items without creating an account or logging in, find the "Preview Questions" box on the home page, then click "Learn More."

Here, you can see each WellSAT item and its scoring guidance. You can expand and contract the items to show or hide the scoring guidance.

Clicking "Next" will take you to the next section of questions.

To return to the home page, simply click the back arrow in the upper left of your screen, or the "Exit" button in the upper right.

If you would like to save your scores or complete a triennial assessment using the WellSAT site, you should register for an account.

Click the register button in the upper right.

Then, enter your information in the form. All fields are required, which helps ensure that other users from your district, school, or institution can locate your scores at a later date if needed.

When you are done, check the reCAPTCHA box, then click Submit.

Once you have registered for an account on the WellSAT site, you can log in any time by clicking “Get Started” or “Log In”.

You will need to enter the email address and password you used when creating your account. If you forget your password at any time, click the “Forgot password?” link to recover your account.

Once you are logged in, you will see a list of any assessments you have completed since the November 2024 website update.

To import assessments created before this update, click the “Copy v3 Assessment” button, then select the assessment you would like to copy over. Click the “Copy” button, and it will be added to your Dashboard.

To create a new assessment, click the red “Create New Assessment” button in the upper left.

In the box that appears, enter information for your assessment. If you are completing a triennial assessment, click the relevant boxes. Otherwise, choose a name for your assessment, which you can use to identify it on your Dashboard.

If you will be scoring practices at individual schools within a district (rather than scoring the practices at a district level), use the school name in your assessment name and create a new assessment for each school you will be scoring.

Select your state, county, and district or school from the dropdown menus. If your district, school, or institution is not listed, select “District Not Found” and type your district, school, or institution’s name in the box.

For the assessment date, select the month and year in which you are completing the assessment. If you are scoring an older local school wellness policy, you can use the date of the policy for this date instead.

Finally, if you would like to copy answers from a previously completed assessment, select the name of the assessment from the dropdown menu. If you completed the assessment on the previous version of the WellSAT website, you will need to first use the Copy v3 Assessment button to copy over the assessment, then you can create your new assessment.

When creating a name for your assessment, remember that others from your district or state may need to find your assessment by name. So, you will want to be descriptive with your name.

You should also avoid abbreviating the name too much. For example, write out “Springfield Public Schools” rather than abbreviating to “SPS.” Longer terms that will be widely understood, such as “Independent School District” or “Consolidated School District” may be abbreviated.

We suggest using the format shown to name your triennial assessment: Your district, school, or institution’s name, followed by “Triennial Assessment” and then the year. Some examples are shown here.

To share an assessment, you first need to create the assessment that will be shared. Then, click the “Sharing” button from your dashboard.

Check that the assessment selected in the dropdown menu is the correct one. Then, type in the email address of the user with whom you would like to share the assessment.

Please note that users must have an account on the WellSAT site before you can share an assessment with them. Click the “Share” button when you are finished entering the required information.

Now let’s orient you to the list of your assessments.

You will see the names you have entered for your assessments on the far left of your dashboard. Click the notebook to view or add notes about the assessment, such as information about the policies used for scoring or the names of personnel who helped complete the assessment.

The date shown is the date you enter when you create an assessment. Typically, this will be the month and year during which you are completing the assessment, but you can also use the date to indicate the effective date of an older policy.

The LEA is the district, school, or institution’s name you selected or entered when you created your assessment.

To edit the scoring of an existing assessment, click the “Policy,” “Practice,” or “Triennial” buttons under “Edit Scoring.” If “Practice” or “Triennial” links are missing, this means that the previous section has not been completed.

To view your scorecard for each section, click the corresponding button in the “Scorecard” column. If the link to the scorecard is missing, this means that the section has not been completed.

The ellipses on the right side of the screen can be used to edit the name, date, and LEA details for your assessment; share your assessment; or archive your assessment to hide it from your view.

As you proceed with the WellSAT, an “Instructions” button will appear in the upper right of the assessment screen. Click on this to view instructions that are specific to the WellSAT Policy, WellSAT Practice, and triennial assessment.

It’s important to note that the WellSAT times out after one hour of inactivity. You will be logged out of your account and will need to log in to continue the assessment. However, the assessment saves your responses as you go, so your work will not be lost.

We hope you will find these video instructions informative. To get started with your triennial assessment, proceed to the WellSAT Policy.

For more information about the WellSAT, please visit the Rudd Center and WellSAT websites.