

TECHNICAL ASSISTANCE HANDBOOK

FOR A NON-CONGREGATE MAILED PROGRAM



Baylor University®
COLLABORATIVE ON HUNGER AND POVERTY

© 2024 Baylor University

For permissions and questions contact collaborative@baylor.edu

CONTENTS

How to Use this Resource Guide	4
About the Baylor Collaborative on Hunger and Poverty	5
I. What is a Mailed Meal Box, Non-Congregate Summer Program?	7
A. Filling a Gap	7
B. Is This Program Right for Your Community?.....	7
II. Glossary of Terms	8
III. Setting Up a Mailed Meal Program	10
Phase 1: Food Vendor Selection	10
A. Vendor Selection Criteria.....	10
B. Meal Box Specifications.....	10
C. Box Inserts	11
D. Box Build Process.....	12
E. Shipping Schedules	12
F. Shared Understanding of Terms.....	13
G. Box Investigations and Box Replacements	14
H. Vendor Data System	15
Phase 2: Data Management System Setup	16
A. Software Data Management System.....	16
B. Participant Application Process.....	17
C. Methods of Enrollment	17
D. Enrollment Application Information.....	18
Phase 3: Staffing	21
A. Enrollment staff.....	22
B. Shipping staff	22
C. Participant support staff.....	22
Phase 4: Box Development	22

A.	Number of meals per box	22
B.	Menus for boxes	22
C.	Dietary Accommodation (DA) Boxes	24
D.	Food Safety	24
E.	Menu Changes and Shipping Delays.....	25
F.	Program Set-up Timeline	25
IV.	The Outreach and Enrollment Process	26
A.	Outreach: Advertising the Program.....	26
B.	Enrollment Period.....	26
C.	Review of Applications	27
D.	Preparing Applications for Shipping	27
V.	Operating a Mailed Meal Program.....	28
A.	Weekly Program Operations	28
B.	Daily Program Operations	29
C.	Participant Support.....	29
VI.	Program Reconciliation* and Program Closeout	31
A.	Box Reconciliation Data.....	31
B.	Box Meal Components	31
VII.	Conclusion	32

HOW TO USE THIS RESOURCE GUIDE

This resource guide is designed to help you decide whether a mailed non-congregate summer meal program is a good fit for your community, and if so, to help you with program set up and operation.

This guide can be used to help school districts, state agencies, and local organizations as they consider and plan for offering a mailed meal box, non-congregate summer food service. This is not a comprehensive guide, and all Contracting Entities (CEs) must follow all regulations, program rules, policies and guidance put forth by their state.

For additional information, please contact the Baylor Collaborative on Hunger and Poverty.

Email: collaborative@baylor.edu

Phone: 254-710-3595

Website: www.hungerandpoverty.org

ABOUT THE BAYLOR COLLABORATIVE ON HUNGER AND POVERTY

The Baylor University Collaborative on Hunger and Poverty

Founded in 2009, the Baylor Collaborative on Hunger and Poverty uses a three-pronged approach that incorporates **Research**, **Policy**, and **Practice** to *cultivate scalable solutions to end hunger*. The Baylor Collaborative believes no one sector can end hunger alone, and multisectoral collaboration is crucial to realizing a world without hunger.

Through projects such as Hunger Free Community Coalitions, the Hunger Data Lab, the Hunger Outreach Programs Empowerment (HOPE) team's federal nutrition outreach, as well as the groundbreaking Meals-to-You demonstration project, the Collaborative's work has contributed to an increase in summer meal site participation and in the number of children receiving school breakfast in Texas. Additionally, the Collaborative has established a new summer meal intervention, modeled after Meals-to-You, for rural America that has recently been adopted by the U.S. Congress for nationwide implementation. The Collaborative's projects, developed through over fifteen years of **Practice** at the local, state, and national levels, has resulted in successful, scalable strategies that improve food security.

Cultivating scalable solutions to end hunger also requires training local, state, and national stakeholders on best practices for collective impact and ways to create and implement innovative, data-driven solutions. Toward that end, the Collaborative partners with Baylor's Truett Seminary Master's degree in Theology, Ecology, and Food Justice. Additionally, the Collaborative launched an Education and Training Center (ETC) to provide training and credentialing opportunities to help stakeholders ranging from local volunteers to corporate executives to innovate and advocate for new programs, policies, and solutions to end hunger.

While the Baylor Collaborative's field personnel work with individual leaders to identify localized issues and develop replicable solutions, its **Researchers** employ rigorous study design to assess program quality, and its Public Affairs and Strategic Partnerships teams translate this work into **Policy** that is effective. This approach bridges the gap between service providers and policymakers to merge localized solutions with verified best practices. By leveraging this collective impact model, the Baylor Collaborative brings all sectors to the table and makes unprecedented solutions possible.

Meals-to-You

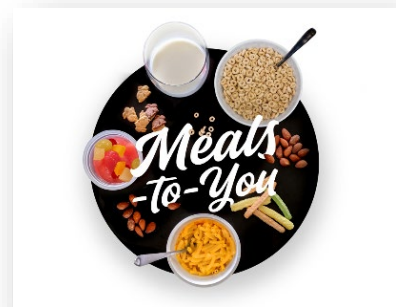
In 2023, the Baylor Collaborative completed its fifth and final year of the Meals-to-You project. Meals-to-You was a joint demonstration project with the United States Department of Agriculture and the Baylor Collaborative in which children in rural America without access to a traditional summer meal site received shelf-stable, nutritious food delivered to their homes during the summer break. Each eligible child's weekly meal box contained individual, shelf-stable meal

components for 5 breakfasts, 5 lunches, and 5 snacks. The meal components met or exceeded all FNS Summer Food Service Program meal patterns and nutritional guidelines. The program also accommodated requested modifications due to food intolerances as well as religious and cultural preferences.

Over five years, this program served more than 2.5 million meals to nearly 31,000 children in school districts across Texas, Alaska, Utah, and New Mexico. During the COVID-19 pandemic, when the program quickly scaled up to expand access, more than 270,000 children received nearly 40 million meals across 43 states and Puerto Rico between April and September 2020.

Evaluations by the Urban Institute have shown that the Meals-to-You program was as effective in reducing food insecurity over the summer months as the National School Lunch Program. The success of the Meals-to-You program contributed to new federal legislation in late 2022 that allows families in rural America now to have access to summer meals through home delivery programs like Meals-to-You and other convenient options.

The Baylor Collaborative looks forward to sharing the knowledge gained and lessons learned from five years of operating the Meals-to-You program as you begin operating your own mailed non-congregate meal box program during the summer months.



I. WHAT IS A MAILED MEAL BOX, NON-CONGREGATE SUMMER PROGRAM?

A. FILLING A GAP

A mailed meal box, non-congregate summer food program seeks to eliminate barriers, such as transportation and distance, rural households face in summer months when needing to access summer meals. Rather than requiring children to travel to a congregate meal site, or even to a grab-and-go location, the mailed meal box model delivers meals directly to eligible children's home addresses or PO Boxes during the summer break. Households with children who are eligible for free or reduced-price meals can enroll in a mailed meal box program and, if verified, can receive meal boxes mailed directly to their home or PO Box.

B. IS THIS PROGRAM RIGHT FOR YOUR COMMUNITY?

To determine whether a mailed meal box program is right for your community, consider the following questions:

1. Do you meet the federal and state guidelines for non-congregate eligibility?
2. Do households in your community need summer meals but face barriers accessing traditional congregate models?
3. Do you have staff availability to operate the program through the summer?
4. Do households in your community have the ability to receive packages through a mail or parcel carrier direct to home or to a post office box?

If you answered yes to these questions, a mailed meal non-congregate program may be a great fit for your community! The remainder of this guide can be used to learn more about how to prepare for and operate this type of program, and we provide suggested effective strategies to help you run a successful program from start to finish.

II. GLOSSARY OF TERMS

Throughout this manual, you will find many program-specific terms and phrases used. The glossary below will familiarize you with them.

- **Address validation:** The process of reviewing addresses to ensure they are identified as deliverable in carrier systems. This can be automated or done manually.
- **Box ID:** Each meal box is assigned a unique identifier that is used to monitor the meal box throughout the program.
- **Box investigation:** The process for reviewing and updating household information for any boxes returned to the sender (typically, the food vendor).
- **Box replacement:** The new (“replacement”) box that is requested for various reasons. For example, the originally shipped box was never received, or the original box was received but had damaged or missing items.
- **Carrier:** The organization delivering the meal box, such as UPS, USPS, or FedEx.
- **Delivered:** The date when carrier information shows the box’s tracking status is delivered, or available for pick up.
- **District window:** The duration of the program for a given school district, starting from the first shipping list to the final shipping list.
- **Household:** All participants registered by the same head of household receiving meals at the same address.
- **Meal box:** The shipped box containing meal components.
- **Participant:** The child enrolled in and eligible for the program.
- **Primary contact:** For every household, the adult who registers the participants in the program and to whom the meals are addressed on each box.
- **Vendor:** Food distribution company contracted to supply food items, pack, and ship meal boxes.
- **Participant support:** Team of staff who work with households directly to answer questions and resolve any problems.
- **Shipped:** The date when the meal box has been picked up by the carrier (e.g. USPS, UPS).
- **Shipping list:** The meal box order that is submitted to the vendor and that includes the number of boxes and the shipping information for each box.
- **Shipping window:** The period of time which the food vendor has to ship a meal box before it is considered late.
- **Tendered date:** The date the shipping list is created and sent to the vendor.

- **Tracking status:** The shipment's status indicator provided directly by the carrier, such as USPS or UPS. If not provided by the food distributor, it can be found on the carrier website and indicates where the package is in the shipping process, from "label acquired" to "delivered."
- **Verification:** The process of verifying or denying a participant application based on that applicant meeting or not meeting program eligibility requirements.

III. SETTING UP A MAILED MEAL PROGRAM

Running a successful non-congregate mailed meal box program requires starting preparations months in advance. This section will explain the four major phases of program planning and provide a recommended timeline for program set up.

PHASE 1: FOOD VENDOR SELECTION

A. VENDOR SELECTION CRITERIA

Crucial to the success of the mailed meal box model is determining who will source the food, pack boxes, send the boxes to participants, and provide box status information once boxes are mailed. *It is best to work with a food distributor who is familiar with federal school lunch and summer meal programs and has the capacity to package and ship the meal boxes from its facility.*

Key questions to ask when selecting a food vendor include the following:

1. Are they familiar with school and summer lunch programs' nutritional and meal pattern requirements?
2. What is their process for sourcing food, and how much time do they need to do so?
3. Do they have the capacity to handle the scope (small or large) of your program?
4. Can they create menus that meet all program requirements (e.g. items are shelf stable, meet nutrition guidelines)?
5. Can they source food items and build boxes that meet dietary accommodations?
6. Do they have the ability to package and ship meal boxes?
7. Do they have a system for managing and sharing shipping information?

Once you select a food vendor, additional details need to be discussed and agreed upon prior to starting the program. Discuss the following topics with food distributors to ensure boxes arrive on schedule and in good condition.

B. MEAL BOX SPECIFICATIONS

Review the following recommendations for the meal box itself:

1. Box Dimensions

The box must be large enough to hold all items, without much extra space to allow for items to shift in transit. The vendors should be able to share what box dimensions will be most cost effective as well.

2. Packing Materials

Determine what packing materials will be used to help minimize damage. These may be items like partition dividers within the box to help keep items from moving, bubble wrap to help prevent crushing, or the packing of liquid items in additional bags to contain any potential spills.

C. BOX INSERTS

At a minimum, boxes must include printed menus and information about how to notify the sponsor or vendor of damaged or missing items. Discuss with the food vendor the format of these items, as well as who will print the materials and how they will be included during the box building process.

We recommend box inserts include the following and are multilingual as needed:

1. Menu, listing components of each meal
2. Program contact information, letting the household know how, when, and why to contact the customer support team.
 - a. Customer support phone number
 - b. Customer support email address
 - c. Customer support phone number where text messages can be sent and received
 - d. Hours of operation
 - e. Anticipated turnaround time for a response
3. USDA required non-discrimination statement



Figure 1: Sample box insert

D. BOX BUILD PROCESS

Additionally, while in the vendor selection process, discuss with the food vendor the box building process. Any reputable food distributor should be able to answer the following questions satisfactorily:

1. Who will be packing the meals?
2. Will existing staff pack the meals or will a new team have to be staffed?
3. What training will the packing team have?
 - a. Will all team members be trained, or just team leads?
 - b. Will there be verbal training only, or printed job guides?
4. Where will the food items be stored before, during, and after the packing process?
5. Will the food items be labeled or stored separately in the warehouse?
6. What will the process be for documenting which menus and food items are used for each build?
7. What is the inventory control process to ensure no expired or spoiled items are used?
8. If they will be building dietary accommodation boxes, what process do they have to ensure there is no cross-contamination of food items?

E. SHIPPING SCHEDULES

A regular shipping schedule, or “cadence,” needs to be agreed upon with the food distributor and maintained for the program’s duration to help ensure boxes arrive at homes at a regular interval.

1. Weekly Shipping Schedule

Our recommended timeline for sending shipping lists to the vendor, box building by the vendor, and shipping boxes is below and was developed based on years of experience during the Meals-to-You program.

- a. Each Monday: The program team submits the shipping list for the week to the vendor
- b. Days 1 – 6: Vendor builds the boxes
- c. Days 7 to 9: Vendor ships the boxes

When setting up the shipping contract with a food distributor, be sure to discuss this shipping cadence with their team to ensure feasibility. Also determine actions to be taken if a box is not shipped by the agreed upon shipping deadline each week. For example, if a box were not shipped by Day 10 in the timeline above, it would be considered late, and the sponsor could require the food distributor to issue a replacement box.

2. Programmatic Shipping Schedule and/or “District Shipping Window”

When planning the program with food vendors, you will also need to determine the duration of the program to enable them to procure adequate supplies and make staffing decisions for the summer while boxes are being built and shipped. You will also need to communicate to participants the first and last week they can expect to receive boxes. If your program is serving multiple school districts, this may vary according to the last day school meals are served during the spring or summer and the first day they resume in the fall.

To determine a program or district shipping window, identify the first and last day of shipping for the entire summer, or the program’s “shipping window,” starting with the date the first shipping list will be sent to food distributors.

If following the timeline in Figure 2 below, the first box would likely be requested the Monday before the school year ends, to ensure it arrives during the first week of the summer break. Similarly, the final boxes of the summer would be requested two weeks before the new school year begins so they arrive the last week of the summer break.



Figure 2: Sample weekly shipping schedule

F. SHARED UNDERSTANDING OF TERMS

As you work with food distributors to draft a contract, be sure all parties understand and agree upon definitions of shipping and delivery terms. Below are three terms that *must* be defined with the food distributor and/or carriers to ensure program integrity and a clean financial reconciliation process.

1. “Delivered”

Most packages will be marked as “delivered” by the carrier. However, there are circumstances that may allow for the meal box to be considered “delivered,” despite a different carrier tracking status. For example, if a participant’s preferred address is a PO Box, the delivery status “available for pickup” at their PO Box could be considered a final, or “delivered,” tracking

status. Though the household has not yet picked the box up, the food distributor, carrier, and program operator have all fulfilled their contractual obligations to deliver the box to the participant's preferred location. Therefore, this box can be considered "delivered."

When drafting a contract, request from the food distributor and/or carrier a list of all possible tracking statuses. Review and determine a "shipped" versus "delivered" designation for each.

2. Weekly Shipping "Window"

- a. *Earliest Ship Date*: What is the earliest the box should be expected to ship, following receipt of the shipping list? For the Meals-to-You program, this was 7 days following the receipt of the shipping list. This allowed 7 days for the vendor to prepare the meal boxes and have the carrier pick them up.
- b. *Latest Ship Date*: What is the latest date the box should ship? For the Meals-to-You program, this was 9 days following the receipt of the shipping list. This is the last day when the meal boxes should be picked up by the carrier.

G. BOX INVESTIGATIONS AND BOX REPLACEMENTS

Unfortunately, not all boxes make it to their intended destination on time and intact. When establishing shipping responsibilities with vendors, you will need to define who is responsible when things do not go as planned.

Most issues related to shipping and delivery can be resolved in one of two ways: (1) through *box investigations*, or (2) through *box replacements*. However, the circumstances and protocol for each need to be determined.

1. A *box investigation* is a process undertaken when the carrier (e.g., Fed Ex, UPS, USPS) flags an issue with box delivery that requires contacting the recipient household for more information. Some scenarios requiring a box investigation might be when the recipient refuses the box or when the box is marked "return to sender" and ends up back at the food distributor's warehouse. In these types of cases, more information is needed from the household to investigate and resolve the problem.
2. A *box replacement* is the action taken when, according to contractually agreed upon criteria, the food distributor must replace a box. Some scenarios might be when a household reports a box has arrived but items in it were

damaged and inedible; or when a shipped box is lost in transit. In both cases, the program team will need to work with the food distributor to request a replacement box and add it to the next shipping list.

To ensure timely responses to households experiencing issues, we recommend *both* a “box investigation” and “box replacement” report be issued *weekly*. For example, program operators may want to create a system by which the food vendor provides the program team with a “box investigation report” each week that lists all boxes that were returned to their facilities for reasons that require contacting the household for more information. The program team can then reach out to households to investigate. The team may discover that a box was returned due to a bad address or perhaps because the household moved, and the new residents refused the box. Following the box investigation process each week, the program team should include any replacement box needs on the upcoming shipping list to be submitted to the vendor.

Additionally, contracts with food distributors should include guidelines for issuing replacement boxes as well as reimbursement guidelines for replacement boxes. For example, the contract should state what actions will be taken and by whom, if a box is damaged in transit or if the box never arrives at the household’s shipping address and needs to be replaced.

The following are just a few of the questions that should be discussed with food vendors and contractually determined:

1. Will boxes whose carrier status indicates it is damaged be automatically replaced, or will boxes be replaced only if the household requests replacement due to damaged or missing items?
2. At what point will replacement boxes be ordered if the original box has not been shipped on time?
3. Which replacement boxes will be considered reimbursable?
4. Will there be a limit to the number of replacement boxes issued to a single household, even if boxes continue to arrive damaged, or missing items?

These are just a few of the many circumstances that may occur throughout the summer that necessitate having clear guidelines for box investigations and box replacements spelled out in a contract. These also require a clear communication plan and timeline for communicating with households, food distributors, and program operators to resolve issues quickly.

H. VENDOR DATA SYSTEM

Verify the vendor has a secure data management system that can store confidential data, track packages, and report status updates for meal boxes as

they move through the shipping process. For the Meals-to-You program, the Collaborative used Salesforce.

How the vendor shares shipping data depends on the infrastructure and software capacities of the food distributor and the program operators. The following are two likely scenarios:

1. *Scenario One:* Data is shared automatically and securely in real time through an API connection that allows the program's data management system and the vendor's system to "talk" to each other directly. Ideally, the vendor has a shipment management system that can share information directly with your program management system in real time.

While this requires more work to set up initially, when the program is operating, having seamless data sharing requires less management and staff time and reduces errors. If an API connection is an option, the vendor's system should be able to link a box's assigned box ID to the box's tracking number, tracking dates, and tracking status in real time in both systems.

2. *Scenario Two:* The vendor has a data management system, but it cannot connect directly to your program management system. In this scenario, the vendor must be willing to share data through a secure system regularly. We recommend that at least three times per week, the vendor through a secure system provides information such as unique box IDs, box tracking numbers, tracking statuses, and shipping dates, so you have current information in your program management system to answer participants' questions and troubleshoot shipping problems.

PHASE 2: DATA MANAGEMENT SYSTEM SETUP

Because boxes are mailed directly to participants, information about the household, as well as the boxes, must be collected and stored. Having accurate data is critical for financial and program integrity. To collect, utilize, and retain this information efficiently, accurately, and confidentially, you will need to use a program management software. The Meals-to-You program used Salesforce since it could be customized to handle large volumes of data spanning a multi-year demonstration program.

A. SOFTWARE DATA MANAGEMENT SYSTEM

The data management software you choose will need to fit the scale and scope of your program. Additionally, the software will need to allow your program to comply with all federal and state requirements regarding consent and confidentiality. We recommend your data management system has, at a minimum, the following capacities:

1. A strong security system that allows for safe storage of confidential personal identifying information (PII) of participants.
2. A participant facing portal, where a household can enroll, monitor shipments, and contact participant support.
3. A program operations portal, where both participant and box information are stored, and team members can communicate with households.
4. *If needed*, a school district facing portal, where district personnel can review and verify applications.

B. PARTICIPANT APPLICATION PROCESS

During the application process, information will need to be collected from each household about the household and its participating children. For program purposes, a household is defined as one adult (the primary contact) and all eligible children 18 and under at the residence.

To operate a clean program, the data management system should have the capacity to create an account for each household where all household information can be stored, including the household primary contact's information. It should also have the capacity to store within that account information for each participant within the household.

For example, if one household has three participating children, the data management system must be able to link the information for each participant (e.g. dietary needs, school district, PII for each child) with the correct household account.

C. METHODS OF ENROLLMENT

It is also important to ensure multiple modes of enrollment are supported by the program management system. While many households may have internet access, many rural households do not and many lack a personal device on which to complete online applications. Because of this, your program's enrollment process should have several enrollment methods.

We recommend providing households a combination of online and manual enrollment options, such as the following, to best meet their needs:

1. Households can enroll themselves through an online system that includes a "Consent to Participate" landing page.
2. School district staff/program sponsor can enroll a household, with its consent, through an online system.

3. School district staff/program sponsor can enroll a household, with its consent, through a manual process (e.g. paper sign up, Excel spreadsheet housed securely)

D. ENROLLMENT APPLICATION INFORMATION

1. Household Consent:

Regardless of enrollment method, the first step is obtaining household consent to collect information necessary for program participation. **Consent must be obtained as the first step of the enrollment process** since confidential information, such as names and birthdates of minors, as well as dietary accommodation needs, will be collected during enrollment and shared with food distributors.

We recommend programs make the consent form the landing page for online enrollment and/or the first page or field in manual enrollment processes.

2. Household Primary Contact:

After obtaining consent, the enrollment form should collect the following information about the adult, primary household contact.

- a. First and last name
- b. Shipping address
- c. Contact information
 - 1) Email address
 - 2) Phone number
 - 3) Preferred contact language
 - 4) Preferred contact method

3. Participant (child) Information:

Once primary contact information has been provided, information for each child the household wishes to enroll must be collected. For each child, the following information should be collected:

- a. First and last name
- b. Date of birth
- c. Gender
- d. Race/ethnicity
- e. If applicable, school or state ID number
- f. School or school district where child is a current student
- g. Dietary accommodation requests

4. Dietary Accommodation Information:

To standardize dietary accommodation options in keeping with food distributor and program capacity, we recommend creating a pick list of the major allergens from which households can select. Then, provide an “other” field where a household can write in other requested accommodations, such as those requested for religious or cultural reasons.

5. Address Verification:

When addresses are entered during enrollment, small errors, or even slight variations (e.g. Po Box, P.O. Box, or PO Box) can cause carriers to reject an address and not deliver boxes.

Developing a built-in address validation step during the application process will help ensure more boxes are successfully delivered, while also cutting down on staff time needed to check addresses while preparing shipping lists.

Keep in mind, however, that rural addresses are often non-standard or not able to be validated through an online system, such as USPS’s address validation tool. For households in this situation, you will need to develop a process for verifying an address with a household, working with vendors and carriers, and ensuring boxes get delivered.

For example, the Meals-to-You online enrollment application routed households whose addresses did not electronically validate to a page with additional questions. That page asked the enrollee whether a package had been delivered to that address in the last 12 months and by whom (e.g. Amazon, UPS). Case Support then contacted the household for more information and provided those details to food distributors and carriers.

6. Household Application Save and Editing Functions:

During the application process, mistakes happen! Birthdays are mistyped, or pages time out before all children are enrolled. Because of this, allowing households to return to and edit their application materials during the enrollment period is beneficial for all parties involved.

However, once all applications have been approved (“verified”), households should no longer be able to edit their account information. Allowing ongoing editing will compromise program integrity. For example, a household could add additional, ineligible children, change dietary accommodations, or update an address—all of which will have significant impact on financial and programmatic integrity as well as participant satisfaction.

After verification, changes to account information should be made through the participant support team to ensure the team can take the appropriate action on behalf of the household.

7. Eligibility Verification Status:

The process of verifying applications will be covered in a later section. However, when developing the enrollment system, a program operator will need to include a process for recording the following information:

- a. Application's verification status
- b. Date the application was verified or denied
- c. Name of person who reviewed and verified or denied the application
- d. Reason for "denial" if application is denied
- e. Approval exceptions field. For example, a three-year old child's application may be "denied" because the child is not enrolled in a participating school district, but that child is still eligible to receive meal boxes because another child in the household *is* eligible. A field noting that child is "meal approved" should be included.

Example of Approval Exception:

The Garcia family has submitted enrollment applications for each of its three children: Ana (11), Ben (8), and Robert (3). Ana and Ben are both enrolled in a participating school district, so their applications are approved. Robert is not school aged and is not enrolled in a participating school. His application is therefore marked "denied."

However, in your program, any child under the age of 18 can receive a meal box if another child at that address has been approved for the program. This is to ensure all children in the household, not just a few, receive food throughout the summer. So even though Robert's application has been "denied," based on school enrollment, he should still receive meal boxes because he is made eligible by being a child under 18 in participating household.

Consequently, Robert's application will have a verification status of "denied" with a denial reason ("not enrolled participating school") but will be "meal approved" and receive meal boxes for the same duration as the verified participants in their household.

8. Box Shipping Information:

In addition to being able to accept and store applicant information, the program management system must be able to generate the request for, update, and store all box information.

To minimize error, it is helpful for shipping lists to be automatically generated by the data management system each week. This way, updates and changes made each week by the team will automatically be reflected in the shipping list sent to vendors.

For each box, the following information should be generated and stored by the data management system:

- a. A box identifier/ID number unique to each box
- b. The shipping information
 - 1) Primary contact name
 - 2) Full address
 - 3) Household account ID
 - 4) Participant ID
- c. Tracking number
- d. Tendered date
- e. Date shipped
- f. Tracking status
- g. Tracking date
- h. Box contents
 - 1) Standard contents
 - 2) Dietary Accommodation contents
- i. Vendor assigned (if more than one)
- j. Box investigation information
- k. Box replacement information

This information needs to be stored to allow the operating team to monitor the progress of each meal box. For programs using an online platform, it also allows households to login and check the status of their boxes. It is also crucial for the program's data reconciliation and reimbursement process.

PHASE 3: STAFFING

To operate a successful program, you will need a team! It may be helpful to think of staffing in three main program phases: (1) enrollment, (2) shipping, and (3) participant support. Staff may serve in multiple capacities throughout the program, but keep in mind the tasks associated with each phase vary greatly. Below are key functions of each staffing group. The person hours required to staff a program will vary, depending on your program's size and scope.

A. ENROLLMENT STAFF

1. Assist with outreach to households and/or school district contacts
2. Review applications
3. Support
4. Perform data cleaning tasks and check accounts for accuracy
 - a. Address validation
 - b. Duplicate management
 - c. Dietary accommodations

B. SHIPPING STAFF

1. Generate shipping list for vendors
2. Monitor shipments throughout the program
 - a. Ensure boxes ship within shipping window
 - b. Ensure boxes are arriving in the agreed upon time frame
 - c. Look for trends in delays or damages
 - d. Create and/or review box investigation and box replacement reports

C. PARTICIPANT SUPPORT STAFF

1. Involved in all stages
2. Interface with participants to help resolve questions and issues
 - a. Assist with the enrollment process
 - b. Contact participants regarding any delays or concerns
 - c. Respond and resolve customer complaints or questions

PHASE 4: BOX DEVELOPMENT

Once a vendor has been selected, it is time to work with the vendors to create the menus for the program! ***Be sure all conversations with food distributors about the number of meals, meal components, nutrition requirements, and dietary accommodations comply with federal and state guidelines for a summer meal program.*** Below are key topics to cover and determine with the food distributor's team.

A. NUMBER OF MEALS PER BOX

Determine what number of meals will be in each box and how often boxes will be sent. Be sure to reference federal and state guidelines to ensure compliance with the number and types of meals that can be included in a single meal box.

B. MENUS FOR BOXES

Work with food distributors to create, review, and approve menus for the summer. We recommend determining and approving all menus for the summer before operations begin. This will allow food distributors time to procure quality items at a competitive price. Below are questions to ask as menus are being determined:

1. Will the weekly menus include the same food items for the entire summer, or will there be rotating weekly menus?

For customer satisfaction, we recommend rotating menus throughout the summer, so participants look forward to and enjoy the food, and households are not overstocked on less popular food items.



Figure 3: Example meal box contents

Ensure all menu items meet all SFSP meal pattern and nutritional requirements, while also including items that are kid-friendly and culturally appropriate for your community.

2. What will be the plan for substituting food items if supply chain or procurement issues require menu item substitutions?

Food distributors who have experience with federal nutrition programs should have the capacity and knowledge to find and make substitutions quickly.

3. What might be a sample menu?

For a weekly food box that provides a shelf stable breakfast, lunch, and snack, the following are sample meal items (with milk and 100% fruit juice also to be included in the box):

- a. Breakfast:
 1. Cereal cups
 2. Granola bars
- b. Lunch/Dinner:
 1. Tuna or chicken salad in a pouch or can
 2. Turkey sticks and cheese
 3. Hummus and crackers

4. Vegetable cups
5. Applesauce
- c. Snacks:
 1. Beef or turkey sticks
 2. Graham crackers
 3. Roasted chickpeas

C. DIETARY ACCOMMODATION (DA) BOXES

Dietary Accommodation (DA) menus need to be reviewed and approved before program operations begin to ensure food items needed to meet participants' requested accommodations are available. We recommend working with vendors before the program starts to create DA menus and procure food items that avoid the most common eight allergens. The top eight most common allergens are the following:

- | | |
|---------------|-------------|
| 1. Dairy/Milk | 5. Tree Nut |
| 2. Egg | 6. Peanut |
| 3. Fish | 7. Wheat |
| 4. Shellfish | 8. Soy |

Depending on vendor preference and the number of dietary accommodation requests, specialized menus can be set for each accommodation request, or accommodations can be grouped to create a menu that accommodates multiple requests. For example, all participants with a soy or strawberry accommodation request receive the same box, with contents free of both soy and strawberry.

D. FOOD SAFETY

1. Expiration dates:

While creating menus with food vendors, ensure vendors can comply with all federal and state food safety regulations and that parameters are set regarding the shelf life of items. Given the nature of the program, it may be weeks between when a meal box is packed and when its contents are consumed. When working with food distributors, be sure they have a process for monitoring expiration dates and ensuring no expired food item gets shipped and no food item will expire within the program's duration.

2. Climate:

Consider the climate boxes will be exposed to during shipping and after arrival. If working in an area that experiences high summer temperatures like Texas, select food items that can endure higher temperatures without degrading or spoiling during transit and maintain quality in the time between when a box is delivered and when it may be taken inside. For all items, vendors should be able to state climate parameters (e.g. "degrades after 12

hours in 120° degrees”) and the measures taken to ensure food items remain safe.

E. MENU CHANGES AND SHIPPING DELAYS

1. Menu Changes:

To help avoid disruptions that delay box shipments and to ensure that all meals meet federal and state meal requirements, establish a process with the food vendor to alert you of item shortages or substitutions during the summer.

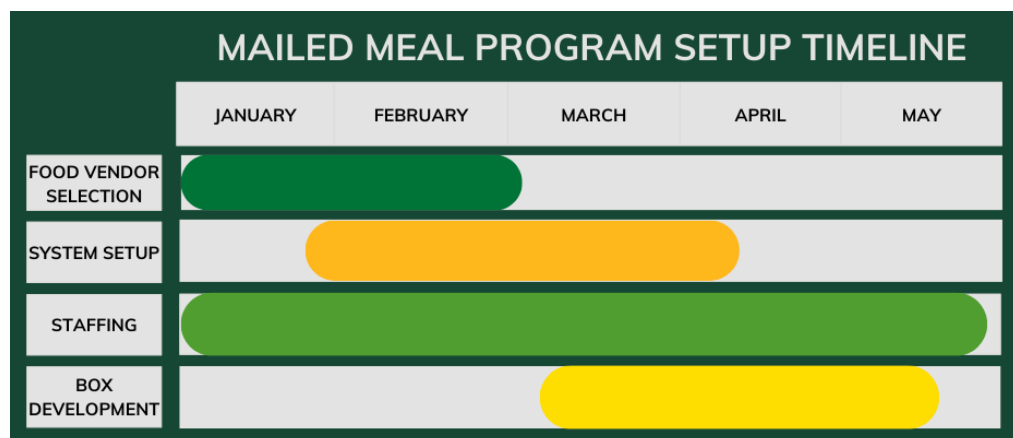
It is best practice to review, approve, and collect the final weekly menus throughout the program both for use in program reconciliation and to help monitor for any unexpected menu changes.

2. Shipping Delays:

The food distributor should also alert the team to *any* shipping delays, no matter how small the delay. This is crucial to keeping participating households informed about any change to box arrival time. It also allows the program team to take corrective action, so boxes are delivered in the appropriate timeframe.

F. PROGRAM SET-UP TIMELINE

During program set up, phases may overlap, depending on the amount of time available for program set up. Below is a sample timeline that shows how you may anticipate overlapping phases.



IV. THE OUTREACH AND ENROLLMENT PROCESS

Once program set up has been completed, the next step is to advertise the program and begin enrolling applicants! In this section, we will discuss setting the enrollment window, reviewing applications, and preparing for shipments.

A. OUTREACH: ADVERTISING THE PROGRAM

Outreach to eligible households and/or school districts should begin as early in the spring as possible. *Please take note of your state and district deadlines for submitting summer meal program plans.* Schedule outreach and enrollment windows with those deadlines in mind.

Outreach methods should use media appropriate for community, ensuring equity of access for all eligible households. For example, if most households in the community do not have internet access, outreach should use media utilized by the community for information, such as local radio. The following are outreach methods you may consider:

1. School website
2. School social media (Instagram, Facebook, X)
3. Printed flyers distributed directly to children at school
4. Local radio
5. Community partners (e.g. tribal offices)

Have the application process ready and able to accept applications when outreach begins.

B. ENROLLMENT PERIOD

The enrollment period should be long enough to provide busy households plenty of time to hear about the program and sign up. However, the enrollment period should also end *at least* three weeks before you expect the first meal box to be shipped.

This will allow program staff time to review and approve applications, verify addresses, communicate with households about dietary accommodations, remove duplicate applications, and prepare a clean shipping list. It will also give vendors adequate time to procure the correct number of items based on the number of children actually enrolled in the program.

C. REVIEW OF APPLICATIONS

During the enrollment window, applications should be reviewed by program staff as they are submitted and checked for the following:

1. Program Eligibility:

Review each child's application for program eligibility, *based on the current USDA guidance for non-congregate summer mailed meal box programs.*

At the time of this manual's publication, to be eligible, the child must meet the following criteria:

- a. Enrolled a participating school district designated as rural by FNS (<https://www.fns.usda.gov/sfsp/rural-designation>)
- b. Eligible for free and reduced-price meals

All other applications must be denied. As explained earlier, depending on your program's rules, denying an application does not automatically disqualify the applicant from receiving meals. If your program allows all children 18 and under in a household to receive meals, if an eligible child lives in the same household, the "denied" status merely signals the student is not currently enrolled in the district.

2. Duplicate Applications:

In addition, staff should review all applications to ensure children are registered only once for the program. To identify potential duplicates, look for multiple applications with the same first and last name, birthdate, or address. If there is a duplicate application identified, it needs to be consolidated to a single application, and the duplicate withdrawn.

D. PREPARING APPLICATIONS FOR SHIPPING

After an application is approved and/or marked as meal approved, two additional steps must be completed to ensure the meal boxes are delivered to the right location and that all contents are safe for the recipient to consume.

1. Address Verification:

Addresses that could not be validated during the application process will need to be verified to ensure the household can receive food boxes at that address.

To verify addresses that are initially rejected as invalid, for example, by the USPS site, use the following process.

- a. Use websites and fee-based services, such as Smarty (formerly SmartyStreets), to attempt to validate an address provided by an applicant.
- b. If the address still cannot be verified, contact the household directly to ensure they have recently and still can receive packages from carriers the food distributor (or sponsor) plans to use (e.g. UPS).
- c. If the household cannot receive packages at the physical address provided, they will need to provide an alternate address where they can receive packages, such as a P.O. Box.

2. Dietary Accommodation Requests:

Program staff will need to contact each household that has requested dietary accommodations to confirm the requested accommodation and gain additional information to ensure appropriate items are sent to that participant.

It is best to contact the household over the phone to receive any additional information to store in their account and share with the vendor. *Make sure all information about dietary accommodations is accurately documented in the correct child/household account so food boxes for that child have contents safe for consumption.*

V. OPERATING A MAILED MEAL PROGRAM

Once enrollment ends and the first shipping lists are sent to vendors, the program team's focus will shift to managing the day-to-day operations of a mailed meal non-congregate program. In this section, program operation and participant support will be covered, as well as a recommended weekly task schedule to ensure all participants receive meal boxes on schedule and intact throughout the summer.

A. WEEKLY PROGRAM OPERATIONS

To ensure accurate and timely shipments each week, the following tasks should be completed on a weekly basis:

1. Generate and send *updated* shipping list to vendors.

Because participant information may change daily, be sure each week's shipping list includes the most recent household account information. For example, a household may have changed addresses or withdrawn from the program, or a replacement box may need to be sent if the prior week's box arrived damaged or was missing.

2. Receive a *box investigation* list from vendors (box refusal, bad address, etc.) and work with the participant support team to contact and document the investigation process. See section III. G. for more information on box investigation reports.
3. Receive a box replacement list from food vendors (for example, boxes that carrier noted as “damaged,” “lost in transit,” that never shipped, etc.) to issue replacement boxes.

For program and financial integrity, be sure to follow a consistent internal process to review each box replacement request, verify a replacement is needed, and check to be sure a replacement for that box has not already been ordered.

Once you’ve determined a replacement is needed, add a replacement box request to the following week’s shipping list.

4. Collect and/or verify that week’s regular box *and* dietary accommodation box menus from the food distributor to make sure all USDA meal pattern requirements are being met.

B. DAILY PROGRAM OPERATIONS

To ensure potential issues with shipping, such as missing or damaged boxes, and issues reported by households get resolved quickly, it is important to complete the following tasks daily:

1. Monitor and respond to messages from households with questions or problems regarding the program or boxes.
2. Monitor all boxes’ tracking statuses to ensure boxes have shipped within the contractually agreed upon shipping window.
3. Monitor all boxes for tracking statuses that indicate damages.
4. Monitor all boxes for delivery delays or trends.
5. Communicate as needed with food distributors to review trends and resolve issues.

C. PARTICIPANT SUPPORT

Having a team able to respond to participating households throughout the summer is a valuable and necessary part of a program’s success. When participants are depending on food arriving each week, they need to know they can get help and answers to questions quickly through a customer support system. Further, ongoing contact with participants provides invaluable insights for the team operating the program.

A participant support team should be trained and in place *during enrollment* to answer questions from school district contacts and enrolling households. It should continue operating *at least one month past* the end of shipping, to ensure participant questions about replacement boxes, etc., that might arrive after regular shipping has ended can still be monitored and answered.

It is also important to keep in mind that responses to participants need to be consistent and accurate. When developing a support team, we recommend developing training materials that can be referenced throughout the summer months and used for ongoing training as needed.

Below are tips and best practices for operating a trained, responsive participant support team.

1. Provide households with multiple contact methods to ensure equitable access to your support team. *No household should be unable to report a problem simply because it lacks the technology to do so.* We recommend providing the following support team contact methods:
 - a. A dedicated phone number
 - b. An email address
 - c. A text messaging phone number
2. Respond promptly to household inquiries. The participant support team should aim to respond to or redirect any messages to the appropriate party within 24 hours.
3. Develop a set of templates for email and/or text message responses to the most common questions and issues. These will ensure responses from the team are consistent and accurate. They also allow for quicker responses.
4. Consider the common languages in your community and try to have support team members proficient in those languages. Having the ability to communicate with participants in their preferred language increases participant satisfaction, allows the team to gain more thorough feedback, and helps ensure a correct response.

VI. PROGRAM RECONCILIATION* AND PROGRAM CLOSEOUT

To ensure the program's operational and financial integrity, accurate data *during rolling operations* must be maintained.

A. BOX RECONCILIATION DATA

As the program is operating, make sure to keep accurate, up-to-date information in the following categories for each box:

1. Box ID
2. Account ID
3. Shipping address
4. Date box ordered
5. Date box shipped
6. Tracking number
7. Box contents
8. Box final tracking status and date
9. Box replacement indicator
10. For replacement boxes, replacement reason
11. For replacement boxes, initial box ID
12. For replacement boxes, party requesting replacement

B. BOX MEAL COMPONENTS

Because box components may change during the summer depending on supplies, be sure to check menus regularly to confirm that each box menu continues to meet the requirements for a reimbursable meal.

*For specific guidelines on SFSP non-congregate program reconciliation requirements and the claims process, please refer to your state's guidelines.

VII. CONCLUSION

For the first time in the history of summer federal nutrition programs, a non-congregate mailed meal box option is available to meet the summer food needs of America's rural families. In rural communities where congregate summer meal programs are not available or accessible because of barriers such as distance, transportation, or work schedules, a mailed meal box program has been proven to be a highly successful alternative to improving food security for low-income families.

Thank you for utilizing this exciting non-congregate option to help ensure children in your community have access to the nutritious food they need for healthy growth and development over the summer months.

For additional information or questions, please reach out to our team at the Baylor Collaborative on Hunger and Poverty.

Email: collaborative@baylor.edu

Phone: 254-710-3595

Website: hungerandpoverty.org