**Local Wellness Policy Triennial Assessment**

Sponsors participating in the National School Lunch Program and/or School Breakfast Program are required to have a local wellness policy for all participating sites under its jurisdiction. At a minimum, the local wellness policy must be assessed once every three years; this is referred to as the triennial assessment. Triennial assessments must determine, for each participating site under its jurisdiction, 1) compliance with the wellness policy, 2) progress made in attaining the goals of the wellness policy, and 3) how the wellness policy compares to model wellness policies. **This documentation should be kept on file with your organization’s written local wellness policy for review by an ISBE monitor during your next school nutrition administrative review.**

Sponsor Name: Site Name:

Date Completed: Completed by:

**Part I: Content Checklist**

Below is a list of items that must be addressed in Local Wellness Policies, based on U.S. Department of Agriculture (USDA) and state guidance. Check the box for each item included in your Local Wellness Policy. For any box that is not checked, consider taking steps to add the item(s) to the policy in the future. For more information, see [ISBE's Local Wellness Policy Content Checklist](https://www.isbe.net/Documents/Local-Wellness-Policy-Content-Checklist.pdf).

Goals for Nutrition Education Nutrition Standards for School Meals Wellness Leadership

Goals for Nutrition Promotion Nutrition Standards for Competitive Foods Public Involvement

Goals for Physical Activity Standards for All Foods/Beverages Triennial Assessments

Provided, but Not Sold

Goals for Other School-Based Food & Beverage Marketing Reporting

Wellness Activities

Unused Food Sharing Plan

**Part II: Goal Assessment**

Per USDA regulations, the triennial assessment must determine compliance with and progress made in attaining the goals of the wellness policy. Input the goals of your local wellness policy into the table below for the corresponding areas: Nutrition Education, Nutrition Promotion, Physical Activity, and Other School-Based Wellness Activities. Indicate if the site is meeting, partially meeting, or not meeting each goal listed. Include any next steps in attaining the goal(s), if applicable. Table rows may be added for additional goals.

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| **Goals** | **Meeting** | **Partially Meeting** | **Not Meeting** | **Next Steps (If Applicable)** |
| **Nutrition Education** | | | | |
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| **Goals** | **Meeting** | **Partially Meeting** | **Not Meeting** | **Next Steps (If Applicable)** |
| **Nutrition Promotion** | | | | |
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| **Goals** | **Meeting** | **Partially Meeting** | **Not Meeting** | **Next Steps (If Applicable)** |
| **Physical Activity** | | | | |
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| **Goals** | **Meeting** | **Partially Meeting** | **Not Meeting** | **Next Steps (If Applicable)** |
| **Other School-Based Wellness Activities** | | | | |
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**Part III: Model Policy Comparison**

As part of the triennial assessment, USDA requires sponsors to assess how their wellness policy compares to model wellness policies. Choose **one** of the model wellness policies below to compare against your local wellness policy. Indicate which model policy was chosen and provide a narrative for each prompt below based on the findings.

[Alliance for a Healthier Generation's Model Wellness Policy](https://www.healthiergeneration.org/take-action/schools/wellness-topics/policy-environment/local-school-wellness-policy/refresh-your) – Local wellness policy created in collaboration with USDA, which exceeds minimum requirements

[Rudd Center's WellSAT 3.0](http://www.wellsat.org/) – Wellness assessment tool that asks a series of questions about your local wellness policy and generates a personalized scorecard based on the results. Users will need to create an account to access this tool.

Other::

1. What strengths does your current local wellness policy possess?
2. What improvements could be made to your local wellness policy?
3. List any next steps that can be taken to make the changes discussed above.