Local Wellness Policy: Triennial Assessment

Background

A local school wellness policy is a written document that guides a local education agency's (LEA) or school district's efforts to establish a school environment that promotes students' health, well-being and ability to learn. The wellness policy requirement was strengthened by the Healthy, Hunger-Free Kids (HHKA) Act of 2010. An assessment of the school wellness policy must be conducted a minimum of once every three years; however, LEAs may assess the policy more frequently.

Triennial Recordkeeping

This assessment resource is offered as a way to summarize the information gathered during the assessment. It contains the three required components:

1. Compliance with the wellness policy
2. How the wellness policy compares to model wellness policies
3. Progress made in attaining the goals of the wellness policy

LEAs can document the assessment in other formats as long as the three required components are included. Keep a copy of the most recent triennial assessment, school building progress reports and additional supporting documentation on file. These will be needed during a School Nutrition Program administrative review.

Public Updates

HHKA requires that LEAs make the following available to the public on an annual basis:

- The wellness policy, including any updates
- Position title of the designated school official(s) who lead the local wellness committee
- Information on how the public can get involved with the local wellness committee
- The Triennial assessment also needs to be made available to the public every 3 years

Resources

- Sample Wellness Policy and Regulation: Developed by Iowa Association of School Boards and Iowa Department of Education, can be utilized as a guide when updating policies.
- Healthy Choices Count 5-2-1-0 Registered Sites: Iowa Healthiest State Initiative has a registration process for schools that includes a questionnaire of current policies and practices. The questionnaire can be used as a tool to review and update the policy.

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Section 1: General Information and Wellness Committee

Information Requested	Complete the requested information in the sections below.
LEA (Local Education Agency) name:	North Union CSD
Date Triennial Assessment was completed:	September 8, 2026
Date of last wellness policy review:	September 8, 2026
How often does the school wellness committee meet?	Annually or as needed
How often does the school wellness committee meet? Date of last meeting?	September 8, 2026
When were the required annual public notifications completed this year?	September 8, 2026

Designated School Wellness Leader

LEAs must designate at least one school official responsible for determining the extent to which each school under their jurisdiction follows the wellness policy.

Name:	Job title:	Email:
Amber Henderson	School Nurse	amber.henderson@nuwarriors.org

School Wellness Committee Members

Schools must permit involvement from parents, students, school food service, teachers of physical education, school health professionals, school board members, school administrators and general public.

Name:	Job title/volunteer:	Email:
Dee Jensen	Food Service Director	dee.jensen@nuwarriors.org
Teresa Sorensen	Cook	Teresa66sorensen@gmail.com
Hollie Anderson	Elementary PE teacher	hollie.anderson@nuwarriors.org
Alex Fisher	High School PE/Health teacher	Alex.fisher@nuwarriors.org
Robert Zotz	High School Principal/parent	robert.zotz@nuwarriors.org
Travis Schueller	Superintendent/parent	travis.schueller@nuwarriors.org
Brian Craig	School Board Member	brian.craig@nuwarriors.org
Vickie Rooney	Community Member	rvrooney@ringtelco.com
Jan Ehmen	Cook	jan.ehmen@nuwarriors.org
Amber Henderson	School Nurse	amber.henderson@nuwarriors.org

Section 2: Compliance with the Wellness Policy

At a minimum, local wellness policies are required to include:

☒Specific goals for nutrition promotion and education

☒Specific goals for physical activity

☒Specific goals for other school-based activities that promote student wellness

☒Standards and nutrition guidelines for all foods and beverages sold to students before, during and 30 minutes after the school day

☒Standards for all foods and beverages provided, but not sold, to students during the school day (classroom parties, classroom snacks brought by parents, incentives, etc.)

☒Policies for food and beverage marketing that allow marketing and advertising of only those foods and beverages that meet the Smart Snacks in School nutrition standards

☒Description of public involvement, public updates, policy leadership, and evaluation plan.

Another form of documentation for Section 2 is the School Wellness Policy Checklist.

Section 3: Comparison to Model School Wellness Policies

The Alliance for a Healthier Generation Model Policy is to be used as a best practice guide. Compare local wellness policy language with the model policy and identify areas where the language is comparable to the model policy and potential areas that can be strengthened.

Optional Resource: WellSAT 3.0, Online quantitative tool that determines where revisions are needed to strengthen the language in school wellness policies and provides sample language.

Areas with similar language:	Potential areas to strengthen language:
• Comparable language when addressing nutrition education and promotion. • Meals and snacks offered meet USDA guidelines. • Encourage parents and teachers to offers treats that are consistent with federal nutrition standards.	• Change language for physical activity to meet the new state guidelines. • A list of healthy food items will be made available to families and staff.

Section 4: Progress Towards Goals

Evaluate your compliance and progress towards each of your goals using a method of your choosing. The Local School Wellness Policy Progress Report is one example that can be used.

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1. mail:
   U.S. Department of Agriculture
   Office of the Assistant Secretary for Civil Rights
   1400 Independence Avenue, SW
   Washington, D.C. 20250-9410; or

2. fax:
   (833) 256-1665 or (202) 690-7442; or

3. email:
   Program.Intake@usda.gov

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