

MENU LABELING IMPLEMENTATION CHECKLIST

The menu labeling regulation, enforced by the Food and Drug Administration (FDA), will require chain restaurants, supermarkets and convenience stores, movie theaters and amusement parks, coffee chains, and other similar establishments with 20 or more units serving restaurant-type food to post calories on the menu or menu board. Additional nutrition information, such as fats, protein, sodium and other nutrients, must also be provided upon a customer's request. Outlets have until May 5, 2017 to comply with this regulation, which means covered establishments will have to get started, if they have not already, to meet the looming deadline.

Food policy and regulation expert Beth Johnson, MS, RD, of the DC advisory firm Food Directions, LLC advised that, "given the abundance of information and documentation required and the changes needed, organizations should begin preparing now." Are you ready?

Be Prepared: 10 Steps to Compliance

1. Analyze Rule & its Explanation

Menu labeling rules apply to restaurants, supermarkets and convenience stores, movie theaters and amusement parks, coffee chains, and other similar establishments with 20+ locations, doing business under the same name and offering for sale substantially the same menu items. These rules will require these establishments to:

- ^ Disclose calorie information on menus and menu boards or placards for standard menu items
- ^ Include succinct statement for suggested daily caloric intake on menu/menu board
- ^ Provide written nutrition information (fat, sodium, protein, et al) for consumers upon request – be sure to post a statement declaring the availability of this information on menus/menu boards

2. Assemble Implementation Team

- ^ Identify implementation leader
- ^ Identify additional team members who will be affected or responsible for implementing menu labeling (i.e., training, quality assurance, innovation, chefs, dietitians, etc. and possible outside council)
- ^ Consider who will be responsible for the on-going documentation that is required

3. Identify the Processes, Systems, Steps, Timeline, & Resources

- ^ Identify the processes necessary to achieve implementation
 - ^ Start with a work-back timeline
 - ^ Identify the steps that need to be completed by certain dates
 - ^ Create a budget

4. Recipe Confirmation & Documentation

- ^ Confirm steps and ingredients for each recipe with culinary teams/chefs/cooks
- ^ Make sure recipes, which will be analyzed, are the recipes actually being used in the restaurants
- ^ Thoroughly document process

5. Prepare for Nutrient Analysis

- ^ If the menu has been analyzed, how recently was it completed? Consider updating analyses if it has not been done recently.
- ^ If the menu has NOT been analyzed identify an internal champion to manage this process

6. Nutrition Analysis

- ^ Nutrient values can be determined by:
 - ^ A dietitian or nutrition consultant
 - ^ Nutrient databases
 - ^ Laboratory analysis
 - ^ Cookbooks
 - ^ Nutrition Facts on labels on packaged foods
 - ^ FDA nutrient values for raw fruits and vegetables
 - ^ FDA nutrient values for cooked fish
 - ^ USDA nutrient values
- ^ Remember, the regulation allows for “reasonable basis” so a laboratory analysis does not have to be done on each item. However, documentation regarding how the calorie and nutrition information was determined for each item is essential.
- ^ Documentation:
 - ^ A signed/dated statement is needed to confirm that the information contained in the nutrient analysis is accurate and complete
 - ^ This should likely be the team member who did the analysis working in close contact with the head of training and/or quality assurance
 - ^ A signed/dated statement is also needed to confirm that the covered establishment has taken reasonable steps to ensure that the method of preparation and amount of the standard menu items adhere to the factors on which its nutrient values were determined.
 - ^ This should likely be the restaurant manager

7. Training

- ^ Determine consistent procedures and processes for recipe development and restaurant practices
- ^ Educate employees about the importance of following the recipes so the nutrition information is as close to accurate as possible
- ^ Educate employees about the importance of serving meal items in nearly the same manner each time to attain consistency
- ^ Implement quality assurance measures such as utilizing specific tools for specific recipes
- ^ Determine on-going training measures
- ^ Document.....Document.....Document

8. Menu Redesign & Printing Cycle

- ^ Identify how calorie information will be displayed on menu/menu board or placard
- ^ Remember to think through how options, such as different calorie levels in salad dressings, will be displayed.
- ^ Include the succinct statement about daily caloric intake: “2,000 calories a day is used for general nutrition advice, but calorie needs vary.”

- ^ Statement: “Additional nutrition information available upon request” is required on menus and menu boards or counter if menu/menu board are not used
 - ^ Menus: statement required on first page
 - ^ Menu Board: statement must appear on the bottom of board

9. Availability of Supplemental Information Upon Request

- ^ Written nutrition information must include the macronutrients that are currently required in the Nutrition Facts label on packaged foods
 - ^ This could be done in a pamphlet, using a tablet, or a poster, for example

10. Compliance Standard

- ^ Compliance Date: May 5, 2017
- ^ There are potential penalties for non-compliance

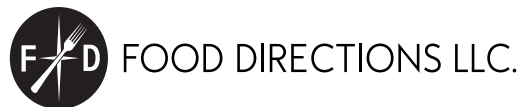
Next Steps & Considerations Post-Implementation

- ^ Process for New Menu Items or Reformulations
 - ^ Identify who will be responsible for menu labeling in an ongoing fashion
 - ^ Determine how often the implementation team will continue to meet
 - ^ Identify the process for new menu items or when reformulations or ingredients change to ensure accurate nutrition information is on the menu/menu board or placard.
- ^ Consumer Impact & Impressions
 - ^ Determine how you will communicate this information to your customers
 - ^ Determine if training is necessary for wait staff to answer questions
- ^ Continue ongoing training for current and new staff to ensure procedures are followed
- ^ Consider an internal audit to determine whether recipes and serving procedures are followed after several months of implementation



[TraceGains](#) provides food and ingredient manufacturers and brokers with a cloud-based, supplier, compliance, and regulatory document management solution for the food supply chain that automates the management of supplier risk, data, and documentation, making companies 365 Audit Ready™.

TraceGains offers the ability to connect supplier data collection with your product lifecycle management (PLM), labeling, and enterprise resource planning (ERP) systems, so that you can avoid laborious and erroneous data double entry, and go to market knowing that your data meet not only your own, but also regulatory requirements. For more information about labeling regulations, including complimentary webinars, articles, and more check out our [Labeling Resource Center](#).



Elizabeth (Beth) Johnson, MS, RD, founded [Food Directions LLC](#) in February 2010. Food Directions is a boutique government relations firm specializing in food policy from farm to fork. Johnson's unique experience and skill set helps clients gain valuable insight into the U.S. Department of Agriculture (USDA), Food and Drug Administration (FDA), Centers for Disease Control and Prevention (CDC) and Capitol Hill. Johnson also has strong relationships with thought leaders at NGOs, food associations, and consumer groups, which help Food Directions gain a diverse perspective on food issues.

