**SFA-FSMC Monitoring Form:**

**USDA Donated Foods**

*The SFA must conduct performance management of the FSMC contract through periodic on-site monitoring of the contracted requirements, as per 7 CFR 210.16(a)(3).*

Monitoring Date:Click here to enter text.

Name of Sponsor and Site(s) Monitored:Click here to enter text.

Name of SFA Official Conducting Monitoring:Click here to enter text.

Documents Needed to assess compliance:

1. FSMC Monthly Invoice
2. USDA Foods Billing Statement
3. FSMC Contract
4. K12/Processor Link/third party tracker balance and usage reports
5. Inventory records
6. DOD invoices
7. Summary End Product Data Schedule (SEPDS) (for processed foods), and value of non-processed food using *FD-080: National School Lunch Program (NSLP), Summer Food Service Program (SFSP), and Child and Adult Care Food Program (CACFP)*
8. Most recent commodity reconciliation reports and supporting documentation

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| **USDA Donated Foods** |  |  |
| 1. Is the SFA conducting, at least annually, a reconciliation to ensure that the FSMC has credited for the value of all USDA Foods received for use in the SFA’s food service?  *Validation Activity:*  *Review the most recent commodity reconciliation reports and supporting documentation.* | **Yes:** The SFA is conducting, at least annually, a reconciliation of USDA Foods received ensuring the FSMC has credited the correct value.  **No**: The SFA has not conducted a USDA Foods reconciliation. | **Yes**    **No** |
| 2. Does the SFA receive credit for the value of USDA- donated foods, received during the school year or fiscal year?  *7 CFR 250.51(a)*  *Note: Credits are applicable to fixed-price contracts while value is applicable to cost-reimbursable contracts*  *Validation Activity:*  *Review FSMC invoices to ensure credits/value are listed* | **Yes**: In both fixed-price and cost-reimbursable contracts, credits/value are shown on invoices and reflect the value of all donated foods received for use in meal service in a school year or fiscal year (including both entitlement and bonus foods). The FSMC should have a process to identify USDA Foods that are used during the school year.  **Needs Improvement**: Credits/values are not reflected on invoices.  **N/A**: The SFA does not receive USDA donated foods. | **Yes**    **Needs Improvement**    **N/A** |
| 3. Does the FSMC contract outline the frequency by which crediting will occur and was that followed? (Crediting is to be performed at least annually.)  *7 CFR 250.51(b)*  *Validation Activity:*  *Review Section 3.6 1(a) of the Contract. Ensure that the FSMC is following the frequency schedule.* | **Yes**: The FSMC contract states how often crediting will occur AND the FSMC is following the agreed upon frequency.  **Needs Improvement**: The contract does not state how often crediting will occur OR crediting is not provided in the agreed upon timeframe.  **N/A**: The SFA orders its own food. Therefore, there are no credits received from the FSMC. | **Yes**    **Needs Improvement**    **N/A** |
| 4. Credit for the value of donated foods was received through (circle all that apply):  *7 CFR 250.51(b)*  Invoice reductions (NOI)  Refunds  Discounts  Other:  *Validation Activity:*  *Review FSMC invoices to ensure credits/value are listed and that the method of issuing credits matches the contract.* | **Yes**: Credit for or value of USDA foods was received. Please specify the method through which credit was received for the value of donated foods. This should be defined in the contract and identified on the invoice from the FSMC.  **Needs Improvement**: Credit for USDA foods was not received, was received but not documented on the invoice, or the agreed upon method was not utilized.  **N/A**: The SFA orders its own food. Therefore, there are no credits received from the FSMC. | **Yes**    **Needs Improvement**    **N/A** |
| 5. Does the FSMC provide clear documentation of the value received and of credit being recognized? (This includes crediting for the value of donated foods contained in processed end products.)  *7 CFR 250.51(b)*  *Validation Activity:*  *Review FSMC invoices to ensure credits/value are listed. Credits should be listed for each category of foods including brown box, DOD, and NOI. Note: The SFA may not receive all types.* | **Yes**: Clear documentation of the credit/value received from donated foods is provided (e.g., separate line-item entries on invoices).  **Needs Improvement**: Documentation is not provided OR it is not clear whether the full value from donated foods was received.  **N/A**: The SFA orders its own food. Therefore, there are no credits received from the FSMC. | **Yes**    **Needs Improvement**    **N/A** |
| 6. Is the FSMC crediting USDA Foods based on the methodology for determining donated foods value as outlined in the FSMC contract?  *7 CFR 250.51(c)*  *Validation Activity:*  *Review the most recent commodity reconciliation and/or the most recent commodity credits and the supporting documentation (i.e., USDA Foods billing statement etc.) to ensure that the credits reflect the correct value, based on the valuation method in the contract.* | **Yes**: The USDA Foods billing statement details the value of USDA Foods received. This is used as the value for all credits.  **Needs Improvement**: The value of USDA Foods, reflected on the USDA Foods billing statement, is not used as the value for all credits.  **N/A**: The SFA orders its own food. Therefore, there are no credits received from the FSMC. | **Yes**    **Needs Improvement**    **N/A** |
| 7. Does the SFA retain title to all USDA donated foods and ensure that all USDA donated foods are made available to the FSMC, including processed foods?  *USDA FSMC Guidance for SFAs, May 2016* ***AND*** *FD-080: National School Lunch Program (NSLP), Summer Food Service Program (SFSP), and Child and Adult Care Food Program (CACFP)*  *Validation Activity:*  *Perform random sample of inventory to ensure it was correctly counted and accounted for onsite, in K12 Processor Link, and any other third-party tracking system.* | **Yes**: The SFA is retaining ownership for all USDA donated foods (including processed foods) and has made them available to the FSMC.  **Needs Improvement**: The SFA has not made all USDA donated foods (including processed foods) available to the FSMC and/or has allowed the FSMC to retain ownership these foods. | **Yes**    **Needs Improvement** |
| 8. Does the SFA/FSMC use USDA donated foods to the maximum extent in quantities that can be used and stored without waste?  *USDA FSMC Guidance for SFAs, May 2016*  *Validation Activity:*  *Review all documentation related to the most recently conducted commodity reconciliation. (USDA Foods Billing Statement, monthly menus, and FSMC inventory report(s) Confirm entitlement dollars are being utilized to the maximum extent and that commodity inventories are in active use.* | **Yes**: The SFA/FSMC uses USDA donated foods to the maximum extent possible, in quantities that can be used and stored without waste.  **Needs Improvement**: The SFA/FSMC does not use USDA donated foods to the maximum extent possible and/or quantities used and stored are producing waste. | **Yes**    **Needs Improvement** |
| 9. Does the FSMC use all donated foods, or commercially purchased foods of the same generic identity, of U.S. origin, and of equal or better quality than the donated foods in the SFA’s food service?  *7 CFR 250.51(d)*  *Validation Activity:*  *Review the USDA Foods Billing Statement, monthly menus, and FSMC inventory report(s), If the FSMC substitutes any foods ensure that all substitutes are of the same quality and U.S. origin.* | **Yes**: The FSMC is using all donated foods, or commercially purchased foods of the same generic identity, of U.S. origin, and of equal or better quality than the donated foods.  **Needs Improvement**: The FSMC is not using all donated foods OR is not using commercially purchased foods of the same generic identify (of U.S. origin or of equal or better quality).  **N/A**: The contract specifically stipulates that the donated foods, and not such commercial substitutes, be used. | **Yes**    **Needs Improvement**    **N/A** |
| 10. Does the FSMC use all donated ground beef, ground pork, and all processed end products in the SFA’s food service without substitution?  *7 CFR 250.51(d)*  *Validation Activity:*  *Review the USDA Foods Billing Statement and FSMC invoices and other documentation to verify the amount of ground beef, ground pork, and all processed end products the SFA has received has been used in the SFA’s food service.* | **Yes**: The FSMC is using all donated ground beef, ground pork, and all processed end products in the SFA’s food service without substitution.  **Needs Improvement**: The FSMC is substituting ground beef, ground pork, and/or processed end products in place of the donated foods.  **N/A**: The SFA orders its own food. | **Yes**    **Needs Improvement**    **N/A** |
| 11. For cost-reimbursable contracts, does the FSMC ensure that its system of inventory management does not result in the SFA being charged for donated foods?  *7 CFR 250.52(b)*  *Validation Activity:*  *Review the most recent end of year reconciliation to determine if the value of donated food used and left in inventory agrees with the value of donated food allocated to the SFA.* | **Yes**: The FSMC stores and inventories donated foods and commercially purchased foods together but ensures that the system of inventory management does not charge the SFA for donated foods.  **Needs Improvement**: The SFA is being charged for donated foods due to the FSMC’s system of inventory management.  **N/A**: This is a fixed-price contract OR the SFA purchases its own food. | **Yes**    **Needs Improvement**    **N/A** |
| 12. Is the FSMC responsible for receiving donated foods on behalf of the SFA?  *7 CFR 250.54*  *Validation Activity:*  *Review Section 3.4 B(7) of the Contract*  a. If yes, is the SFA verifying delivery of donated food shipments and end products and not relying solely on the FSMC records?  *7 CFR 250.54(c)*  *Validation Activity:*  *Review the supporting documentation provided to the SFA with the monthly FSMC invoice and/or as part of the commodity reconciliation process to ensure that FSMC documentation is supported with appropriate back-up (i.e. USDA Foods Billing Statements, vendor invoices, 3rd party reports, etc.)*  *.* | **Yes**: The FSMC is responsible for receiving donated foods on behalf of the SFA.  **N/A**: The FSMC is not responsible for receiving donated foods on behalf of the SFA, OR the SFA purchases its own food.  **Yes**: The SFA is verifying delivery of donated food shipments and end products.  **Needs Improvement**: The SFA is relying solely on FSMC records to verify delivery of donated food shipments and end products.  **N/A**: The SFA purchases its own food. | **Yes**    **N/A**    **Yes**    **Needs Improvement**    **N/A** |

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| **List Corrective Actions taken for all “Needs Improvement” items.**   1. Click here to enter text. 2. Click here to enter text. 3. Click here to enter text. 4. Click here to enter text. 5. Click here to enter text. | **Date of Implementation**  Click here to enter Date |

Other Comments:Click here to enter text.

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| Signature of FSMC Representative:  Click here to enter text. | Title:  Click here to enter text. | Date:  Click here to enter text. |
| Signature of SFA Official:  Click here to enter text. | Title:  Click here to enter text. | Date:  Click here to enter text. |