

NUTS & BOLTS

OF SCHOOL NUTRITION PROGRAMS

USDA Foods Utilization Check Up

Food Distribution Staff: Ahmed Bilimoria,
Marion Browning and Belinda Wilson

November 21, 2019



MASSACHUSETTS DEPARTMENT OF
ELEMENTARY AND SECONDARY
EDUCATION

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1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
- (2) fax: (202) 690-7442; or
- (3) email: program.intake@usda.gov.

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Learning Objectives

By the end of this session participants will be able to:

- Clarify options available for USDA Foods entitlement usage and District's responsibilities for each option.
- Identify resources available to assist with entitlement usage.
- Determine actions needed to enhance USDA Foods utilization.

Food Distribution Staff



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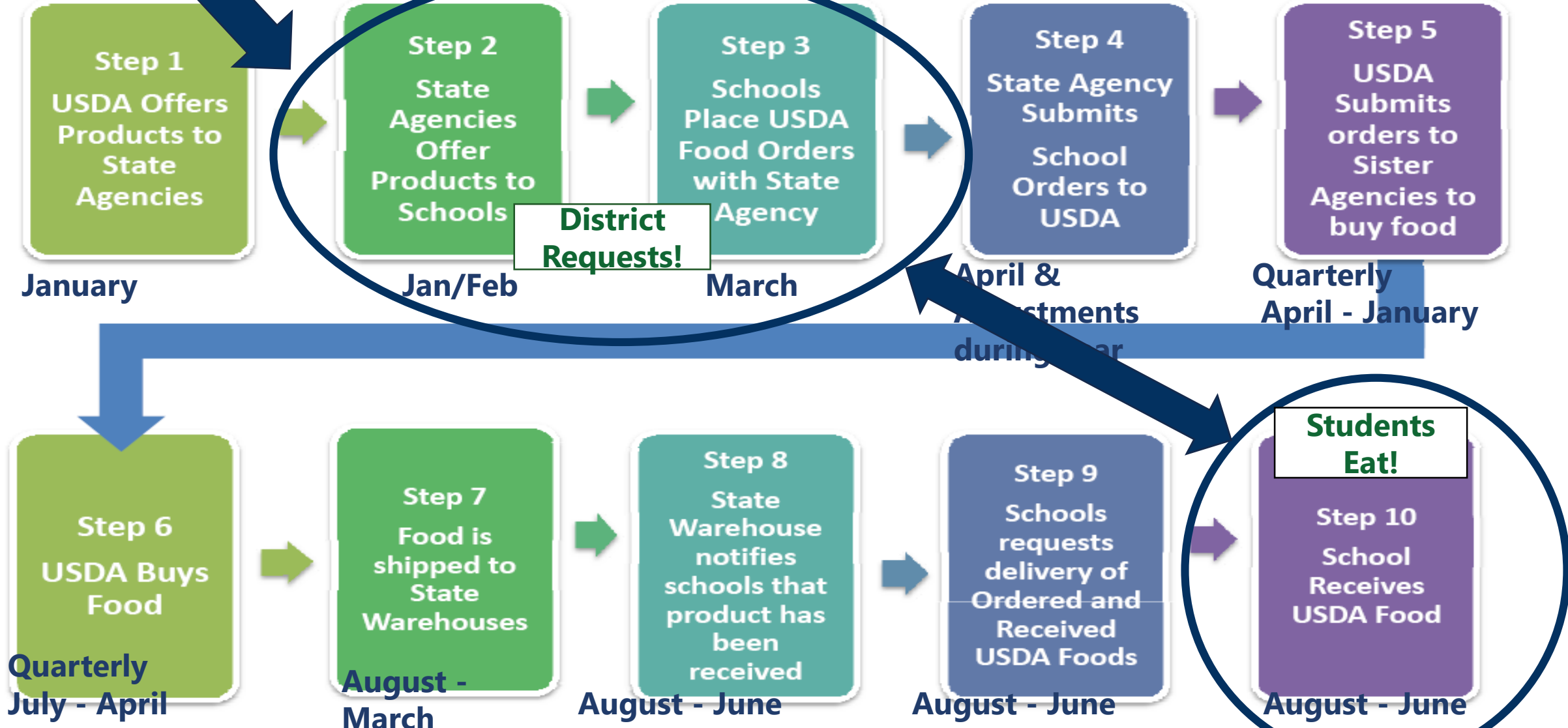
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01

Forecasting and Entitlement

USDA Foods School Ordering Process



Forecasting

- ★ Aka...making a prediction based on a calculation of established factors.
 - ★ What are those factors?
- ★ Why...so you can partner with your vendors in making sure you have what you need, when you need it.
- ★ ...not an exact science...a thought out plan is better than no plan...and yes, hiccups will happen.

Forecasting = Planning!

Integrate and Plan All Sources

- Commercial food purchases
- USDA Foods
 - Processors – Which manufacturer wins products on your commercial bid with distributors?
 - Brown Box
 - DoD Fresh
- Other –Farm to School
- Local grants

Forecasting - Role of Menu

- Always begin with your menu!
 - It is Your Plan!
 - How else do suppliers know what you need?
 - Forecasting starting point
 - Cycle menu or other?
 - Standardized recipes
 - Role of USDA Foods in your menu
 - Evaluate past menu offering
 - Production records
 - Velocity Reports from suppliers
 - USDA Foods Entitlement Usage – Security Portal Tool(s)
 - Staff input
 - Student feedback – What increases participation????

Forecasting – Role of Menu

- Which Products are most versatile?
 - Commercial vs. USDA Foods
 - Brown Box vs. Processing End Products
 - Duplication??
 - Chicken products:
 - Chicken products: Brown Box vs. Processed
 - Unseasoned Chicken Strips
 - 110711-BEEF PATTY Cooked FRZ 2.0 MMA
 - Vendor may change during school year
 - Do you need consistent taste?
 - Do you need consistent quantity?
- Past Pricing Comparisons

Entitlement – What is it ?

- A financial asset from USDA to supplement a School District's Food Costs.
 - **Only a true asset to district if utilized by district!!!!**
- A "bank account" or "gift card" that a District draws upon.
- Does not cover 100% of a District's Total Food Costs.
 - **What are your total food costs? What % is covered by USDA Foods????**



Entitlement Formula



***Reimbursable lunches* served**

X



USDA Foods Assistance Rate

=

Entitlement Value of Foods



USDA Food Assistance Rate SY 19-20 is .2375

- No ala carte, breakfast, snacks, at risk dinners, etc.
 - Can use food but not part of entitlement formula

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Entitlement Plan on the Security Portal



Mass.gov
Massachusetts Department of
Elementary & Secondary Education

username:

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Entitlement Plan

PLEASE CLICK ON THE [Help](#) ? LINK ON THE TOP RIGHT HAND SIDE OF THE SCREEN FOR A QUICK START GUIDE WITH DETAILED INSTRUCTIONS FOR COMPLETING THIS APPLICATION.

Fiscal Year [2020](#) ▼

Component	Due Date	Disposition	Disposition Date	Estimated Entitlement	Allocated Dollars
				177,189.16	0.00
Brown Box Survey	03/15/2019 Closed	Submitted ▼	03/15/2019		114,649.37
Diversion Survey	03/15/2019 Closed	Submitted ▼	03/08/2019		38,011.75
DoD Fresh Commitment	03/15/2019 Closed	Approved ▼	03/08/2019		25,000.00
Less Total Planned					177,661.12
Remaining					-471.96

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Click on each Component to access requests made March 2019.

State has requested food from USDA based on your submitted Entitlement Plan.

Security Portal - Entitlement

- Entitlement Plan
- Entitlement Summary – Actual usage
 - Refused Value
 - Entitlement Detail
 - A&D vs. GFS
 - Processing charges and DoD Charges:
 - Security Portal is lump sum charges to Entitlement
 - Actual usage is reflected in other computer systems:
 - K-12 Services and Processor Link
 - FFAVORS

02

DoD Fresh

DoD Fresh - Procurement

- The United States Department of Agriculture Department of Defense Fresh Fruit and Vegetable Program (USDADoDFresh):
 - allows schools to use USDA Foods entitlement dollars to buy fresh produce.
- Department of Defense (DOD) procures the vendor:
 - Hartford Provisions Company (HPC)
- The vendor:
 - procures product - includes storage and transportation.
 - is responsible for performance of Sub-contractor:
 - Sub-Contractor: Costa Fruit & Produce
 - ***Contact HPC, not Costa if there are any issues!***

DoD Fresh: Eligibilities for SY 19-20

- \$10,000 total entitlement
- Up to 25% of total entitlement can be committed
- Minimum to commit is \$2,500 ($\$150 \text{ min drop} \times 10 \text{ months} = \1500)
- Delivery up to Four (4) locations
- Program runs 10/1/2019 – 5/15/2020
 - Any unused funds are swept on 5/15/2020

DoD Fresh in 6 easy steps

1

Annually sign
up for DoD

Now

2

Find out your
delivery day

August

3

Place your order
in FFAVORS 1
week prior

October 1st

4

Receive order,
verify American
Grown

5

Receipt your
order in
FFAVORS

6

Place your next
order 1 week
prior

DoD Fresh: Catalogue Choices

- **All DoD Fresh Products must be American Grown!**
 - A contractual requirement of the vendor
- Not all products can be grown year round in USA:
 - ☐ Growing season
 - ☐ Weather conditions
- Must be Available & Affordable in sufficient quantity
- New items for FFAVORS catalogue:
 - Email State



DoD Fresh: Non-American Products

- **All DoD Fresh Products must be American Grown!**

- A contractual requirement of the vendor

- Refuse any non-American product

- ☐ Take photo

- ☐ Note on BOL – “Refused 5 cases of X”

- ☐ No time to check? –
“Subject to Claim & Count”

- ☐ Driver & District sign BOL

- ☐ Edit receipt in FFAVORS

- ☐ Email HPC, DLA and State



DoD points of contact

- **The Vendor** Hartford Provisions Company
 - Helps with any delivery / availability of foods even for the sub contractor
- **Produce Specialist** David Lucht
 - Helps with produce quality or customer service issues
- **DoD Fresh Program** Amanda Holzman
 - Helps with FFAVORS technical support
- **FFAVORS** E-Auth Help Desk
 - Helps with Login to FFAVORS & Account set up
- **DESE** Rick Finnigan
 - Helps with General program questions & Annual application

03

Processing aka Diversion

Why Process:

- Help ensure food safety by limiting handling of raw product in school foodservice operations;
- Reduce labor costs and cash outlays for food preparation;
- Reduce storage and delivery costs;
- Have their bulk USDA Foods delivered directly from USDA vendors to their contracted processor(s).

Tools to Use for Processing: Carry Over Policy Revised



Jeffrey C. Riley
Commissioner

Massachusetts Department of Elementary and Secondary Education

75 Pleasant Street, Malden, Massachusetts 02148-4906

Telephone: (781) 338-3000
TTY: N.E.T. Relay 1-800-439-2370

To: Child Nutrition Directors and School District Business Officials
From: Robert M. Leshin, Director
Office for Food and Nutrition Programs
Date: February 15, 2019
Subject: USDA Foods: Massachusetts Processing Program – Carry Over Policy

The USDA Foods Processing Program is one way in which school districts in Massachusetts can utilize its entitlement dollars. A major goal of Processing is to make greater use of the available USDA Foods and to offset the rising costs associated with your meal programs.

Any unused pounds will be swept June 30, 2019.
Do not factor in carry over pounds when diverting for SY 19-20

Processing - Procurement

- **USDA** procures (buys) raw bulk product & sends to your chosen processor.
 - (Diversion Survey)
- **District** procures (buys) end product
 - (Bid with Commercial Distributor(s))
- **State** approves Processors & Products selling in MA (Processor Packets & SEPDS)
- **State does not procure nor bid any end products.**

Fact or Fiction?

- I chose to divert (process) and the state took all of my pounds!

Answer: Fiction



Allocation Memo

To: School Districts that Process USDA Foods in School Year 2019-2020
From: Food Distribution, Office for Food and Nutrition Programs
Date: June 11, 2019
Subject: USDA Foods: Allocations and Balances at Processors

School Year 2019-2020 (SY19-20) Processing Program *initial allocations for Districts* have been provided to processors and brokers at levels lower than you may have fully requested on your diversion survey. The Massachusetts Department of Elementary and Secondary Education (DESE) has intentionally taken this action to address our excessive inventory at processors. We are continuing to work with USDA and processors to reduce our excessive balances.

Background Information:

For School Year 2018-2019 (SY 18-19) Massachusetts spent \$5,595,561 of entitlement funds on processing. By Mid-May 2019, the inventory value on hand at processors was \$2,212,719. This means 39.5% of our total entitlement spent on processing was not used and not received in districts for meal service to students. This also results in excessive inventory at processors.

Only when you order and receive finished products are you using your pounds and obtaining a financial benefit to your food programs. Submitting your Diversion Survey and not ordering finished products does not provide food for students nor dollars to your bottom line.

Regulations require that no more than 6 months of inventory based on actual usage is on-hand at a processor.

Allocation Action Steps

- Initial allocations to a processor:
 - based on actual SY 18-19 statewide usage plus a buffer.
 - range of actual usage varies by processor and the range is between 40% to 90%.
- Usage will be monitored monthly:
 - as a district uses pounds, we will allocate more.
 - allocation to a district *up to 100% requested on Diversion Survey*.

Allocation Action Steps

- Things to keep in mind include:
 - Is your correct Distributor listed in K-12 Services and/or Processor Link?
 - On-line pound monitoring tools are used by everyone in the tracking process.
 - Your correct information is crucial to crediting your usage and billing you properly for finished products.
 - Free account for Districts
 - An advantage to processing is consistency of product on your serving line.
 - Are orders placed on a consistent basis with your distributor so pounds are used?
 - Are you receiving the correct finished products ordered and, on your bid, or are substitutes occurring?

Tools to Use for Processing: SY 19-20 Processor Contact Information

Tracking Software & Links to Nutritionals:

Tracking Software: K-12 Service, Processor Link , other		Links to Nutritionals	
https://processorlink.com		https://www.sunnyfresh.com/k-12-resources	
http://next.k12foodservice.com/		https://michaelfoods.com/foodservice/all/segments-served/k-12	
https://processorlink.com		http://www.goldkistfarms.com/products/	
http://next.k12foodservice.com/		Please request from broker until our website is updated	

Processor Link and K-12 Services provides a FREE ACCOUNT to Districts. Companies, Distributors, USDA and States utilize the systems – please join too!

Processing - Tracking and Using Your Pounds

Transfers

- State must approve all transfers.
- District can only transfer pounds to another company in year first bought.
 - A form is required to be signed by all:
 - Both companies, district, state & USDA
- State Account – into & out of. Send email to Belinda
- Explain reason/plan for transfer.
- Advise number of pounds to transfer from which company and to which company.



04

Brown Box

Brown Box – Procurement and Strengths

- Product Procurement done by USDA (Entitlement)
 - All products are required to be American Grown
 - Brown Box Fruits & Vegetables are popular because of this.
 - Meets meal pattern requirements
 - Less Time Writing Specifications
- Commercial equivalents
- Storage and transportation procurement done by state
 - Districts serviced by A&D/Goodfellas Trucking can procure own transportation contract.

Why Complete your Pre-Brown Box Survey?

- Pre-Brown Box Survey is:
 - Sent via Survey Monkey prior to the actual posting of the Brown Box Survey on the Security Portal (Late Dec/Early Jan).
 - Responses inform products included on the Security Portal posted Brown Box Survey (Late Jan/Early Feb)

Why Complete your Brown Box Survey?

- Food Distribution orders based on your surveys – please be mindful of what you order! 😊😊😊
- If not ordered, then not on Offer Sheet.
 - Not ordered means:
 - Checked NONE Box on Survey or
 - Did not check NONE box, but did not enter case count for product
- If you request it, state is expecting you to take during the next school year.

Security Portal – Brown Box Survey

- Things to keep in mind when completing:
 - Date of Delivery *to Warehouse*
 - Grand Total of cases for each Date of Delivery to Warehouse
 - Totals by Storage Type for each Delivery Period

Product	Price†	NONE	08/15/19	08/31/19	09/15/19	09/30/19	10/15/19	10/31/19	11/15/19	11/30/19	12/15/19	12/31/19	01/15/20	01/31/20	02/15/20	02/29/20	03/15/20	03/31/20	TTL QTY
GRAINS, RICE, SEEDS																			
100935 - SUNFLOWER SEED BUTTER 6-5#S (B477)	\$59.25	<input type="checkbox"/>	8	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A	N/A	N/A	N/A	N/A	18
110393 - WHOLE WHEAT PANCAKES FRZ-144 COUNT	\$12.35	<input type="checkbox"/>	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A	N/A	N/A	N/A	N/A	20
111100 - CEREAL, OAT CIRCLES, BOWLS 96/1 OZ BOWLS	\$16.86	<input type="checkbox"/>	N/A	N/A	N/A	N/A	8	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	8
Grand Total			286	99	76	62	256	42	176	40	206	118	186	80	255	88	219	15	2204

†Prices are effective July 1, 2019

Storage Type	08/15/19	08/31/19	09/15/19	09/30/19	10/15/19	10/31/19	11/15/19	11/30/19	12/15/19	12/31/19	01/15/20	01/31/20	02/15/20	02/29/20	03/15/20	03/31/20	TTL QTY
Cold	173	63	26	32	192	16	111		166	58	96	60	191	23	164	15	1386
Dry	113	36	50	30	64	26	65	40	40	60	90	20	64	65	55		818

Brown Box Survey

*Food must be
delivered to
warehouses before it
appears on an Offer
Sheet or in your
account at GFS!*

ALLOCATION LESS THAN 80% OF BALANCE. ALLOCATE. Please keep entering as you have more money to spend.

☐ Decline All

Date of Delivery to the Warehouse:

Product	Price [†]	NONE	08/15/19	08/31/19	09/15/19	09/30/19	10/15/19	10/31/19	11/15/19	11/30/19	12/15/19	12/31/19	0
POULTRY													

What Region/Warehouse has the State Assigned to me?

- Refer to your District Application on the Security Portal

Mass.gov
Massachusetts Department of
Elementary & Secondary Education **UAT**

username: [Home](#) > [School Lunch and Breakfast](#) > Applications

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*Application **2020 Amend 1 (IN PROCESS)** **Select**

School Lunch and Breakfast SFA Application

Agm #	12-001	Fiscal Year	2020	Status	IN PROCESS
Amendment #	1	*Effective Date	08/29/2019		
IRS Status	Non-Profit	Sponsor Type	Public		

*SFA Name	Shinington Public Schools				
*Physical Address					
*City/Town	plymouth	State	MA	*Zip	02351 -
Remarks					

Administrator/Director	Peter Schafer			
Telephone	781-982-2150	Ext.		
Superintendent/CEO				

From your Security Portal Home page:

- School Lunch and Breakfast
- Applications
- District App

What Region/Warehouse has the State Assigned to me?

- Refer to your District Application on the Security Portal
Scroll to the bottom of screen

For State Use Only			
Severe Need Lunch	<input type="checkbox"/>	Consultant	Dawson, Kevin ▾
Warehouse Used	A and D Cold Storage, Inc. ▾		
Approve	In Process ▾	Approval Date	
Temporary Suspension	<input type="checkbox"/>	Temporary Suspension By	
Temporary Suspension Reason			
Termination Reason	▾	Termination Date	

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What Region/Warehouse has the State Assigned to me?

- Refer to your District Application on the Security Portal
Scroll to the bottom of screen

For State Use Only			
Severe Need Lunch	<input type="checkbox"/>	Consultant	Dawson, Kevin ▼
Warehouse Used	GFS Taunton ▼		
Approve	In Process ▼	Approval Date	
Temporary Suspension	<input type="checkbox"/>	Temporary Suspension By	
Temporary Suspension Reason			
Termination Reason		Termination Date	

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How to Order Brown Box if Assigned to GFS Taunton (Gordon)

Gordons Food Service



Select the method you receive product and **SIGN IN**

Sign In

Please select who you are

If you are not yet a customer with an account number, a Gordon GFS customer, or a returning registered job applicant, please return to browse our site or become a customer.

 **Truck delivery customer in the U.S.** **SIGN IN**

Delivery Customer Technology Support: (800) 968-6437 or csa@gfs.com

 **Store customer with a Gordon GO! account** **SIGN IN**

Enter your **Username** and **Password** and **Sign In**

How to Place Order

Commodity Management Application

NOTE: This section is for those that order USDA commodities.

Commodity Management Application Shields

Note: The shields show you which of your products are USDA commodity products and provide you with important information.



Available at a commodity price.



Available at a commercial price. (Entitlement depleted.)



Commodity item. (Did not divert.)



Not available for purchase. (Entitlement depleted.)

Item #	Description	Price	Allocation
15471	1/2 lb. Ground Beef (80/20)	1.25	1.25
25478	1/2 lb. Ground Beef (80/20)	1.25	1.25
15472	1/2 lb. Ground Beef (80/20)	1.25	1.25
15473	1/2 lb. Ground Beef (80/20)	1.25	1.25


Click on the Shield or Allocation Balance under the quantity box to show USDA commodity details

How to Order Brown Box if Assigned to A&D Cold Storage

Security Portal

Mass.gov
An Official website of the Commonwealth of Massachusetts
Executive Office of Education
online! MassEdu Gateway

ESE Security Portal


User Name
Password (Case Sensitive)
Login
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Monthly Offer Sheet

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*Period

**Food Allocation/Acceptance Notice
No. 328221**

YTD Entitlement Summary as of 05/24/2019

	Total	YTD Budget	YTD Used
Processed	37,355.60	37,355.60	25,259.32
DoD Fresh	30,000.00	30,000.00	0.00
Brown Box	109,657.08	109,657.08	126,451.20
Totals	177,012.68	177,012.68	151,710.52

General Information										
Mailing Address	36R Bartlett Street Andover, MA 01810	Period	JUN-2019 OFFER							
Phone	978-623-8501	Status	SUBMITTED (close date 06/21/2019)							
Warehouse	A and D Cold Storage, Inc.	Allocation Factor	2479							
		Carrier	New England Ice Cream Corp.							
USDA Foods Code	Item Description	Next Req Del Date	Unit Value	Account Balance	Newly Offered	Total Available	Accept Now Allowed Range	Accept Now	Accept Next Month	Units Not Accepted
100018	CHEESE PROCESS YEL SLC LVS-6/5 LB (Bo65)	08/15/2019	59.31	0	2	2	0-2	2	0	0
100019	CHEESE PROCESS WHT SLC LVS-6/5 LB (Bo66)	08/15/2019	59.54	0	3	3	0-3	3	0	0
100021	CHEESE MOZ LM PART SKM SHRD FRZ BOX-30LB (Bo37)	08/15/2019	60.72	0	6	6	0-6	6	0	0
100022	CHEESE MOZ LM PART SKIM FRZ LVS-8/6 LB (Bo42)	08/15/2019	92.68	0	4	4	0-4	4	0	0
100256	STRAWBERRY FRZ CUP-96/4.5 OZ (A417)	08/15/2019	43.33	0	1	1	0-1	1	0	0

When your Brown Box Survey and Offer Sheet don't match.

Brown Box Survey is a...

- Request, not an actual order!
- Carefully planned wish list.
- Method of budgeting for high volume versatile products.
- Way to let USDA know what items they should *TRY* to buy.
 - But this doesn't always happen!

Monthly Offer Sheet is a...

- A list of actual food that has arrived at the state contracted warehouses.
- District can accept all this month or "accept next month"
- If items are not accepted, returns to general fund and reallocates out next month

When your Brown Box Survey and Offer Sheet don't match.

Survey Says...

- Product not listed on survey:
- Product requested on survey:
- I requested specific number of cases:

Why Offer Sheet Does not Say...

- Leftover from prior school year
- New product from USDA
- USDA did not buy
- Delivery Date to Warehouse?
- State must request by full truck load even if demand is for less
- Another district did not accept full quantity on prior offer sheet



05

Small Group Discussions

First Small Group Discussions

- 1) On your own, review your Entitlement Report
- 2) Briefly describe your district – size, # locations, central kitchen, satellite kitchens, staff, storage and more!
- 3) Discuss how you decide how to use your entitlement & challenges involved with deciding.

Second Small Group Discussions

- Using examples provided for your group, determine best options for USDA Foods and why.
 - Utilize menu and price comparisons provided.

Third Small Group Discussions

- Discuss what you have learned and how it could apply to your challenges with USDA Foods.
- Prepare to report out to larger group the (3) key “Insider Tips and Tricks to using USDA Foods” from your small group work today.

THANK YOU

Marion Browning, Belinda Wilson, Ahmed Bilimoria

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