SFA-FSMC Monitoring Form

Review Date: _____

Name of District and Site Monitored: _____

Menus and Service	Yes	Needs Improvement	N/A
Has the FSMC followed the 21-day cycle menu, as described in contract, for the first 21 days of the contract? (Monitored during the first year of contract only)	☐	☐	☐
If changes were made to menus following the first 21 days of the contract, did the SFA approve them?	☐	☐	☐
Have all menu standards been maintained as to type and quality of meal service as outlined in the contract?	☐	☐	☐
Have all menus been developed using the agreed upon menu planning system(s)?	☐	☐	☐
Is the FSMC serving only reimbursable meals that comply with the latest USDA dietary guidelines as established by USDA in Federal regulations for the National School Lunch Program, the School Breakfast Program, and all other USDA contracted meal programs?	☐	☐	☐
Has the SFA has retained control of the quality, extent, and general nature of its food service?	☐	☐	☐
Has the SFA made no payment to the FSMC for meals that are spoiled or unwholesome at time of delivery, or do not meet detailed specifications, or do not otherwise meet the requirements of the contract?	☐	☐	☐
Are production records completed each day for all meals claimed for reimbursement?	☐	☐	☐
Is the FSMC following regulations concerning not selling restricted foods of minimal nutritional value in the food service areas during meal service periods (e.g., carbonated beverages, certain candies, water ices and chewing gum)?	☐	☐	☐
Are meals monitored after the last food or menu item is served/selected to ensure that only reimbursable meals are claimed?	☐	☐	☐
Do the foods purchased meet the quality specification standards indicated in the contract?	☐	☐	☐
Does the SFA evaluate the FSMC's menus for affordability, nutrition requirements, and appeal to the students?	☐	☐	☐

USDA Donated Foods	Yes	Needs Improvement	N/A
Does the SFA received credit for the value of USDA-donated foods, received during the school year or fiscal year?	☐	☐	☐
Credit for the value of donated foods was received through (circle all that apply): Invoice reductions Refunds Discounts Other:	☐	☐	☐
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.)	☐	☐	☐
Does the USDA Foods billing statement detail the value of the USDA Foods received and that it was used as the value for all credits?	☐	☐	☐
Does the FSMC contract outline the frequency by which crediting will occur and was that followed? (Crediting is to be performed at least annually.)	☐	☐	☐
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?	☐	☐	☐
Does the SFA/FSMC use USDA donated foods to the maximum extent in quantities that can be used and stored without waste?	☐	☐	☐
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?	☐	☐	☐
Does the FSMC use all donated ground beef, ground pork, and all processed end products in the SFA's food service without substitution?	☐	☐	☐
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?	☐	☐	☐

USDA Donated Foods continued	Yes	Needs Improvement	N/A
Is the FSMC responsible for receiving donated foods on behalf of the SFA?	☐	☐	☐
If yes, is the SFA verifying delivery of donated food shipments and end products and not relying solely on the FSMC records?	☐	☐	☐

Financial Accountability Procedures	Yes	Needs Improvement	N/A
Do the food service daily meal count records accurately reflect the counts of student and adult meals by meal type and eligibility category?	☐	☐	☐
The FSMC maintains records to support the Claims for Reimbursement, reports claim information to the SFA promptly at the end of each month, and has meal count records for meals not covered by the Claim e.g., adult meals.	☐	☐	☐
Do the food service daily income records accurately reflect the revenue received by meal type? (student meals, adult meals, a la carte, etc.)	☐	☐	☐
For FSMC Cost Reimbursement Contracts: Has the SFA audited the food and non-food invoices to assure that bills sent reflect actual expenses?	☐	☐	☐
Has the SFA audited time reporting forms to assure only actual hours worked are billed to the SFA?	☐	☐	☐
Are allowable costs paid from the nonprofit school food service account net of all discounts, rebates, and other applicable credits accruing to or received by the FSMC?	☐	☐	☐
Is the FSMC transparent in its identification of all rebates, discounts, and applicable credits, and does the FSMC provide sufficient information to permit the SFA to identify allowable and unallowable costs?	☐	☐	☐
Are all bills monitored to assure that the FSMC has not double-billed or included costs that are not allowed by the contract?	☐	☐	☐

Sanitation and Safety Procedures	Yes	Needs Improvement	N/A
Are facilities and equipment adequately maintained for safety and sanitation?	☐	☐	☐
Do employees practice safe food-handling procedures?	☐	☐	☐
Are State health licenses maintained as required by the contract?	☐	☐	☐
Does the SFA assure that all State and local regulations are being met by the FSMC?	☐	☐	☐

Other Contractual Requirements	Yes	Needs Improvement	N/A
Has the FSMC used the advisory committee of parents, students, and teachers to assist in menu planning?	☐	☐	☐
Have all corrections been made as required if problems were noted during an SFA review, administrative review, or a program audit?	☐	☐	☐
Does the SFA have procedures in place to monitor the FSMC's contract compliance?	☐	☐	☐
Is documentation of monitoring maintained?	☐	☐	☐
Has the FSMC staffing plan been approved by the SFA?	☐	☐	☐
Have staffing plan been followed per the Contract?	☐	☐	☐
Has the SFA retained all food service responsibilities not allowed to be delegated to the FSMC?	☐	☐	☐
If "no," list what was delegated:	☐	☐	☐
FSMC's food service operations are monitored by the SFA through periodic on-site visits to ensure that the food service is in conformance with program regulations and that program review and audit findings are resolved.	☐	☐	☐
Is documentation of monitoring maintained?	☐	☐	☐
Have all responsibilities of the sponsor and the FSMC been implemented as defined by the terms of the contract? If no, explain.	☐	☐	☐

Procurement Requirements	Yes	Needs Improvement	N/A
Did the SFA follow the appropriate procurement procedures when awarding the FSMC contract including preparing all contract documents? (These documents include, but are not limited to, bid specifications, the RFP, the contract, and any contract amendments.)	☐	☐	☐
Were there an adequate number of qualified RFP responses to permit reasonable competition?	☐	☐	☐
Was the RFP publicized, and were any reasonable requests by other sources to compete honored to the maximum extent practicable?	☐	☐	☐
Was the FSMC awarded the contract based on the SFA-provided mechanisms for technical evaluation of the proposals?	☐	☐	☐
Was the contract awarded to the responsible offeror whose proposal was the most advantageous to the SFA with price and other factors considered (with price as the primary factor)?	☐	☐	☐

List Corrective Actions taken for all "Needs Improvement" items.	Date of Implementation

Other Comments:

Signature of FSMC Representative:	Title:	Date:
Signature of SFA Official:	Title:	Date: