

Local Education Agency (LEA) Food Service Management Company (FSMC) Monitoring Form

Review Date:

Name of District and Site Monitored:

Menus and Service	Yes	Needs Improvement
1. 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)	<input type="checkbox"/>	<input type="checkbox"/>
2. If changes were made to menus following the first 21 days of the contract, did the LEA approve them?	<input type="checkbox"/>	<input type="checkbox"/>
3. Menu standards have been maintained as to type and quality of meal service. All menus have been developed using the agreed upon menu planning system(s).	<input type="checkbox"/>	<input type="checkbox"/>
a. The FSMC is 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.	<input type="checkbox"/>	<input type="checkbox"/>
b. The LEA has retained control of the quality, extent and general nature of its food service.	<input type="checkbox"/>	<input type="checkbox"/>
c. The LEA has made no payment is 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.	<input type="checkbox"/>	<input type="checkbox"/>
4. Are production records completed each day for all meals claimed for reimbursement?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are the regulations followed concerning not selling restricted foods of minimal nutritional value (carbonated beverages, certain candies, water ices and chewing gum) in the food service areas during meal service periods?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are meals monitored after the last food or menu item is served/selected to ensure that only reimbursable meals are claimed?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do the foods purchased meet the quality specification standards indicated in the contract?	<input type="checkbox"/>	<input type="checkbox"/>

Menus and Service continued	Yes	Needs Improvement
8. The LEA evaluates the FSMC's menus, for affordability, nutrition requirements, and appeal to the students?	<input type="checkbox"/>	<input type="checkbox"/>
USDA Donated Foods <i>(Please skip to #20 if you do not use Donated Foods)</i>	Yes	Needs Improvement
9. The LEA received credit for the value of USDA-donated foods, received during the school year or fiscal year?	<input type="checkbox"/>	<input type="checkbox"/>
10. Credit for the value of donated foods was received through (circle all that apply): Invoice reductions Refunds Discounts Other:	<input type="checkbox"/>	<input type="checkbox"/>
11. The FSMC provided 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.	<input type="checkbox"/>	<input type="checkbox"/>
12. The USDA Foods billing statement from DESE, Food and Nutrition Services, which details the value of the USDA Foods received was used as the value for all credits?	<input type="checkbox"/>	<input type="checkbox"/>
13. The FSMC contract outlined the frequency by which crediting will occur and was that followed? (Crediting is to be performed not less frequently than annually)	<input type="checkbox"/>	<input type="checkbox"/>
14. The LEA retains title to all USDA donated foods and ensures that all USDA donated foods are made available to the FSMC, including processed?	<input type="checkbox"/>	<input type="checkbox"/>
15. The LEA/FSMC is using USDA donated foods to the maximum extent in quantities that can be used and stored without waste?	<input type="checkbox"/>	<input type="checkbox"/>
16. The FSMC used 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 LEA's food service.	<input type="checkbox"/>	<input type="checkbox"/>
17. The FSMC used all donated ground beef, ground pork, and all processed end products in the LEA's food service without substitution.	<input type="checkbox"/>	<input type="checkbox"/>
18. For Cost-Reimbursable Contracts, the FSMC ensures that its system of inventory management does not result in the LEA being charged for donated foods?	<input type="checkbox"/>	<input type="checkbox"/>
19. Is the FSMC responsible for receiving donated foods on behalf of the LEA? If yes, is the LEA verifying delivery of donated food shipments and end products and not relying solely on the FSMC records.	<input type="checkbox"/>	<input type="checkbox"/>

Financial Accountability Procedures	Yes	Needs Improvement
20. Do the food service daily meal count records accurately reflect the counts of student and adult meals by meal type and eligibility category?	<input type="checkbox"/>	<input type="checkbox"/>
21. The FSMC maintains records to support the Claims for Reimbursement and reports claim information to the LEA promptly at the end of each month and has meal count records for meals not covered by the Claim e.g., adult meals?	<input type="checkbox"/>	<input type="checkbox"/>
22. Do the food service daily income records accurately reflect the revenue received by meal type? (student meals, adult meals, a la carte, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
23. For FSMC Cost Reimbursement Contracts:	<input type="checkbox"/>	<input type="checkbox"/>
a. Has the LEA audited the food and non-food invoices to assure that bills sent reflect actual expenses?	<input type="checkbox"/>	<input type="checkbox"/>
b. Has the LEA audited time reporting forms to assure only actual hours worked are billed to the LEA?	<input type="checkbox"/>	<input type="checkbox"/>
c. Allowable costs paid from the nonprofit school food service account are net of all discounts, rebates, and other applicable credits accruing to or received by the FSMC?	<input type="checkbox"/>	<input type="checkbox"/>
d. The FSMC is transparent in their identification of all rebates, discounts, and applicable credits and the FSMC provides sufficient information to permit the LEA to identify allowable and unallowable costs?	<input type="checkbox"/>	<input type="checkbox"/>
24. Are all bills monitored to assure that the FSMC has not double-billed or included costs that are not allowed by the contract?	<input type="checkbox"/>	<input type="checkbox"/>
Sanitation and Safety Procedures	Yes	Needs Improvement
25. Are facilities and equipment adequately maintained for safety and sanitation?	<input type="checkbox"/>	<input type="checkbox"/>
26. Do employees practice safe food handling procedures?	<input type="checkbox"/>	<input type="checkbox"/>
27. Are State health licenses maintained as required by the contract and the LEA assures that all State and local regulations are being met by the FSMC?	<input type="checkbox"/>	<input type="checkbox"/>

Other Contractual Requirements	Yes	Needs Improvement
28. Has the advisory committee of parents, students and teachers met in menu planning? How often do they meet per year:	<input type="checkbox"/>	<input type="checkbox"/>
29. Have the advisory committee meetings been documented?	<input type="checkbox"/>	<input type="checkbox"/>
30. Have all corrections been made as required if problems were noted during a LEA review, an administrative review, or a program audit?	<input type="checkbox"/>	<input type="checkbox"/>
31. The LEA has procedures in place to monitor the FSMC's contract compliance? Documentation of monitoring is maintained?	<input type="checkbox"/>	<input type="checkbox"/>
32. Has the FSMC staffing plan been approved by the LEA? Has staffing plans been followed per the Contract?	<input type="checkbox"/>	<input type="checkbox"/>
33. The LEA retains all food service responsibilities not allowed to be delegated to the FSMC? If "no," list what was delegated:	<input type="checkbox"/>	<input type="checkbox"/>
Other Contractual Requirements continued	Yes	Needs Improvement
34. The LEA monitors the FSMC's food service operations through periodic on-site visits to ensure that the food service is in conformance with program regulations, and program review and audit findings are resolved? Documentation of monitoring is maintained?	<input type="checkbox"/>	<input type="checkbox"/>
35. Have all responsibilities of the sponsor and the FSMC been implemented as defined by the terms of the contract? If no, explain.	<input type="checkbox"/>	<input type="checkbox"/>
Procurement Requirements	Yes	Needs Improvement
36. The LEA followed the appropriate procurement procedures when awarding the FSMC contract and prepared all contract documents? These documents include, but are not limited to, bid specifications, the RFP, the contract and any contract amendments.	<input type="checkbox"/>	<input type="checkbox"/>
37. Was there an adequate number of qualified RFP responses to permit reasonable competition?	<input type="checkbox"/>	<input type="checkbox"/>

38. The RFP was publicized and any reasonable requests by other sources to compete were honored to the maximum extent practicable?	<input type="checkbox"/>	<input type="checkbox"/>
39. The LEA provided mechanisms for technical evaluation of the proposals received and the contract was awarded to the responsible offeror whose proposal was the most advantageous to the LEA, price and other factors considered?	<input type="checkbox"/>	<input type="checkbox"/>
40. Unsuccessful offerors were notified promptly?	<input type="checkbox"/>	<input type="checkbox"/>

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

Other Comments:

Signature of LEA Official:	Title:	Date:
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