

USDA Foods Usage

Participant Guide

This participant guide provides resources, hand-outs, activities, and space to write notes during class. It is designed to supplement the class rather than directly mirror the PowerPoint slides in a one-to-one manner.

Training Overview

| | |
|---|---|
| Length | 1.5 hours |
| Description | This session guides the participant through best practices for tracking and monitoring usage of USDA Foods and its importance for USDA Reconciliation auditing. |
| Target Audience | Child Nutrition Directors and program administrators Child Nutrition Managers |
| USDA Key Areas | Nutrition (1000) Operations (2000) |
| USDA Professional Standards Code | Menu Planning (1100) Purchasing/Procurement (2400) Receiving and Storage (2500) |
| Learning Objective(s) | Understand Tracking and Monitoring requirements and best practices for drawing down inventory Identify reporting platforms and system(s) needed and how to execute reports for each commodity category Identify requirements, steps, and best practices for USDA Foods reconciliation |

Common Acronyms

| | |
|--------------------|---|
| CACFP | Child & Adult Care Food Program |
| CE | Contracting Entity (same as RA) |
| FND/F&N | Food & Nutrition |
| NSLP | National School Lunch Program |
| RA | Recipient Agency (same as CE). This term is more common in USDA |
| SFA | School Food Authority (same as CE and RA) |
| TDA | Texas Department of Agriculture |
| USDA | United States Department of Agriculture |

References & Resources

| | | |
|------------------------|--------------------------------------|--|
| SquareMeals.org | TDA Food & Nutrition Website | News, resources, and trainings for all 12 Food & Nutrition programs in Texas |
| ARM | Administrator's Reference Manual | ARM Section 14, USDA Foods ARM Section 14a, USDA Foods Processing ARM Section 16 Financial System |
| TheICN.org | Institute of Child Nutrition Website | The ICN is the only federally funded national center dedicated to applied research, education and training, and technical assistance for child nutrition programs. |

Why Does This Matter

Me

- How will this class help me?

My Organization

- Which specific areas within this course topic does their organization needs help or guidance with?

My Food Program Participants

- How will this class help the recipients of my food program?

Activity

Summer Berry ISD allocated USDA Foods entitlement to direct delivery, processing, and DoD. Look at the reconciliation documents, and answer the questions.

WBSCM Entitlement/Bonus Summary Report

| 1 | 6 | 7 | 8 | 9 | 10 | 11 |
|---------|--------------|-------------------|------------------|------------------|-------------|--------------|
| Program | Program Year | Beginning Balance | DOD Fresh Amount | Ent. Order Total | Ent. Pounds | Ent. Balance |
| NSLP | 2024 | \$50,900.00 | \$16,000.00 | \$34,232.28 | 95,850 | \$667.72 |


Direct Delivery Reporting

(Table abbreviated to show relevant columns)

| Material Desc. | Date Received | Program | Requested Qty. | Sales Unit | Net Dollar Value |
|---------------------------------------|---------------|---------|----------------|------------|------------------|
| SPAGHETTI SAUCE MEATLESS CAN-6/10 | 9/10/23 | NSLP | 45 | CS | 1167.33 |
| CHICKEN DICED CTN-40 LB | 10/10/23 | | 100 | CS | 10,062.00 |
| CHICKEN FAJITA STRIPS CTN-30 LB | 11/10/23 | | 50 | CS | 3986.87 |
| PORK HAM WATERAD SLC FRZ PKG-8/5 LB | 1/10/24 | | 5 | CS | 559.74 |
| CHEESE MOZ LITE SHRED FRZ BOX – 30 LB | 1/10/24 | | 150 | CS | 7446.00 |
| SUNFLOWER SEED BUTTER 6-5#S | 3/10/24 | | 10 | CS | 483.24 |

Reconciliation Documents Continued on Next Page


K12 Food Service Reporting

| | | | | | | | | | | | | | | | |
|---|--------------|------------------------------------|----------|-----------|-----------|-----------|-----------|-----------|------------|-------------|----------|-----------------|----------------------|----------------------|----------|
|  | Customer Nbr | | | | | | | | | | | | Distributors | 70% Active | |
| | Regional | Lee Ann Mykytyn | | | | | | | | | | | SYSICO - DALLAS (TX) | | ACTIVE |
| | Brokerage | AFFINITY GROUP SOUTHWEST - ADDISON | | | | | | | | | | | | | |
| # | \$ | | | | | | | | | | | | | | |
| 110227 - POTATO FOR PROCESS INTO DEHY PRD-BULK | | Allocated Dollars | | | | | | | \$2,347.81 | | | Balance Dollars | | | \$713.22 |
| | | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total | |
| Usage \$ | \$0.00 | \$-47.12 | \$-47.12 | \$-117.80 | \$-164.92 | \$-129.58 | \$-247.38 | \$-247.38 | \$-223.82 | \$-338.79 | \$-70.68 | \$0.00 | \$0.00 | \$-1,634.59 | |
| ADJ \$ | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | |
| TFR \$ | \$0.00 | \$1,052.35 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$-3,439.27 | \$0.00 | \$0.00 | \$0.00 | \$-2,386.92 | |
| Usage % | 0% | 1% | 1% | 2% | 3% | 3% | 5% | 5% | 5% | 7% | 1% | 0% | 35% | | |

| | | | | | | | | | | | | | | | |
|---|--------------|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|-----------|-----------------|----------------------|-----------------------|--------|
|  | Customer Nbr | | | | | | | | | | | | Distributors | 100% Active | |
| | Regional | Matt Bowles | | | | | | | | | | | SYSICO - DALLAS (TX) | | ACTIVE |
| | Brokerage | NONE | | | | | | | | | | | | | |
| # | \$ | | | | | | | | | | | | | | |
| 110149 - BULK APPLES FOR PROCESSING | | Allocated Dollars | | | | | | | \$4,353.41 | | | Balance Dollars | | | \$1.25 |
| | | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total | |
| Usage \$ | \$-10.68 | \$-349.20 | \$-366.36 | \$-530.52 | \$-307.80 | \$-184.68 | \$-678.84 | \$-456.12 | \$-356.52 | \$-710.88 | \$-393.72 | \$-6.84 | \$-4,352.16 | | |
| ADJ \$ | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | | |
| TFR \$ | \$873.23 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$-94.08 | \$779.15 | | |
| Usage % | 0% | 10% | 10% | 15% | 9% | 5% | 19% | 13% | 10% | 20% | 11% | 0% | 122% | | |

| | | | | | | | | | | | | | | | |
|--|--------------|------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|----------|-----------------|----------------------|-----------------------|---------|
|  | Customer Nbr | | | | | | | | | | | | Distributors | 100% Active | |
| | Regional | Laura Hawes | | | | | | | | | | | SYSICO - DALLAS (TX) | | ACTIVE |
| | Brokerage | AFFINITY GROUP SOUTHWEST - ADDISON | | | | | | | | | | | | | |
| # | \$ | | | | | | | | | | | | | | |
| 100332 - TOMATO PASTE FOR BULK PROCESSING | | Allocated Dollars | | | | | | | \$2,866.84 | | | Balance Dollars | | | \$-1.76 |
| | | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total | |
| Usage \$ | \$0.00 | \$-292.05 | \$-325.63 | \$-252.00 | \$-408.89 | \$-136.86 | \$-519.86 | \$-321.10 | \$-226.77 | \$-288.22 | \$-97.22 | \$0.00 | \$0.00 | \$-2,868.60 | |
| ADJ \$ | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | |
| TFR \$ | \$0.00 | \$423.96 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$-1,253.50 | \$-829.54 | |
| Usage % | 0% | 8% | 9% | 7% | 11% | 4% | 14% | 9% | 6% | 8% | 3% | 0% | 78% | | |

Reconciliation Documents Continued on Next Page

| | | | | | | | | | | | | | | |
|---|-----------------|-------------------------|-------------|----------------------------|----------|-----------|----------|----------|-------------|-----------------|----------|--|--------------|--------------|
|  | | Customer Nbr 1000319791 | | <u>Distributors</u> | | | | | | | | 100% | | |
| | | Regional Linda Ballas | | DIRECT SHIP / NONE ACTIVE | | | | | | | | Active | | |
| | | Brokerage NONE | | SYSCO - DALLAS (TX) ACTIVE | | | | | | | | | | |
| # | \$ | | | | | | | | | | | | | |
| 100154 - BEEF COARSE GROUND FRZ CTN-60 LB | | Allocated Dollars | | | | | \$959.04 | | | Balance Dollars | | | | \$0.01 |
| | | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total |
| | Usage \$ | \$0.00 | \$-95.80 | \$0.00 | \$-47.90 | \$-123.07 | \$-95.80 | \$-79.36 | \$-175.16 | \$-95.80 | \$-47.90 | \$-47.90 | \$-150.34 | \$-959.03 |
| | ADJ \$ | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | TFR \$ | \$0.00 | \$15,878.98 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$-8,066.24 | \$-23,894.68 | \$0.00 | \$0.00 | \$-19,426.83 | \$-35,508.77 |
| | Usage % | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 3% |

Reconciliation Documents Continued on Next Page

FFAVORS Reporting

| SUMMER BERRY ELEMENTARY | |
|-----------------------------------|-------------------|
| Starting Balance | \$16,000.00 |
| Spent, This Customer | \$2,567.03 |
| Spent, Others | \$13,111.08 |
| Remaining Balance | \$321.89 |
| SUMMER BERRY MIDDLE SCHOOL | |
| Starting Balance | \$16,000.00 |
| Spent, This Customer | \$4,354.63 |
| Spent, Others | \$11,323.48 |
| Remaining Balance | \$321.89 |
| SUMMER BERRY HIGH SCHOOL | |
| Starting Balance | \$16,000.00 |
| Spent, This Customer | \$8,756.45 |
| Spent, Others | \$6,921.93 |
| Remaining Balance | \$321.89 |

Questions

1. What is the value of USDA Foods used for processing?
2. What was the value of USDA Foods received for direct delivery?
3. How much entitlement is remaining?

Notes

A large, empty rounded rectangular box with a thick blue border, intended for taking notes. The box is centered on the page and occupies most of the vertical space below the 'Notes' header.

Next Steps

Identify Key Take-Aways

-
-
-

Create a Plan

-
-
-

Contact for TA

My ESC Number:

My ESC Contact Name:

My ESC Contact Email:

My ESC Contact Phone
Number

Other Info:

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To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/ad-3027.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:**
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or
2. **fax:**
(833) 256-1665 or (202) 690-7442; or
3. **email:**
program.intake@usda.gov

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