

Food Service Management Company (FSMC) Monitoring Form

Review Date: _____

Name of District and Site Monitored: _____

Menus and Service	Yes	No	N/A	Notes
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"/>	<input type="checkbox"/>	
2. If changes were made to menus following the first 21 days of the contract, did the SFA approve them?	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	
4. 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"/>	<input type="checkbox"/>	
5. The SFA has retained control of the quality, extent and general nature of its food service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. The SFA has 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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Are production records completed each day for all meals claimed for reimbursement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. 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"/>	<input type="checkbox"/>	
9. 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"/>	<input type="checkbox"/>	
10. Do the foods purchased meet the quality specification standards indicated in the contract?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

11. The SFA evaluates the FSMC's menus, for affordability, nutrition requirements, and appeal to the students?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
USDA Donated Foods	Yes	No	N/A	
12. The SFA received credit for the total entitlement value of USDA foods for the school year or fiscal year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13. 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"/>	<input type="checkbox"/>	
14. The FSMC provided clear documentation of the value received and of credit being recognized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15. The USDA Foods Entitlement Report which details the value of the USDA Foods received was used as the value for all credits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16. 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"/>	<input type="checkbox"/>	
17. The SFA 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"/>	<input type="checkbox"/>	
18. The SFA/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"/>	<input type="checkbox"/>	
19. 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 SFA's food service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20. The FSMC used all donated ground beef and ground pork in the SFA's food service without substitution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21. 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 not relying solely on the FSMC records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Financial Accountability Procedures	Yes	No	N/A	

22. 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"/>	<input type="checkbox"/>	
23. The FSMC maintains records to support the Claims for Reimbursement and 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?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24. 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"/>	<input type="checkbox"/>	
25. Does the FSMC utilize the correct meal equivalency factor (MEF)? List the MEF: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26. Does the FSMC provide the SFA with all information and documentation needed for the SFA to calculate its program and non-program revenue and cost proportion as required by regulations? (For example, POS records, cost-per-meal data, and inventory or financial reports).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sanitation and Safety Procedures	Yes	No	N/A	
27. Are facilities and equipment adequately maintained for safety and sanitation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
28. Do employees practice safe food handling procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
29. Are State health licenses maintained as required by the contract and the SFA assures that all State and local regulations are being met by the FSMC?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30. Has the FSMC provided documentation showing the training hours and topics completed by all employees providing services for the SFA?				
Other Contractual Requirements	Yes	No	N/A	
31. 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"/>	<input type="checkbox"/>	
32. Have the advisory committee meetings been documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
33. In the past year, during an administrative review, procurement review, or audit, were any findings due to the FSMC?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

34. If fiscal action resulted in findings due to the FMSC, was the SFA about to recoup lost funds from the FSMC?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
35. Has the FSMC provided requested documentation within a reasonable time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
36. The SFA has procedures in place to monitor the FSMC's contract compliance? Documentation of monitoring is maintained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
37. Has the FSMC staffing plan been approved by the SFA? Have staffing plans been followed per the Contract? # FSMC Employees in contract: _____ # FSMC current employees: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
38. Has the FSMC adhered to minimum pay standards as laid out in the contract (if applicable)? Hourly rate of lowest paid FSMC employee: \$_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
39. The SFA 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"/>	<input type="checkbox"/>	
40. The SFA 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"/>	<input type="checkbox"/>	
List the dates and locations of the three most recent monitoring visits: Date: _____ Site: _____ Date: _____ Site: _____ Date: _____ Site: _____				
41. 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"/>	<input type="checkbox"/>	
Procurement Requirements (only in first year of contract)	Yes	No	N/A	
42. The SFA 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"/>	<input type="checkbox"/>	
43. Was there an adequate number of qualified RFP responses to permit reasonable competition?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

44. 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"/>	<input type="checkbox"/>	
45. The SFA 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 SFA, price and other factors considered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
46. Unsuccessful offerors were notified promptly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

Other Comments:

Signature of SFA Official:	Title:	Date:
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