



Calendar of Activities for School Procurement of Commercial and Commodity Foods

By
Food Distribution Workgroup

Minnesota
Department

of Education 

FOOD PROCUREMENT QUARTERLY CHECKLIST
Commodity & Commercial Food Procurement Activities
Fall Quarter: July - September

- 1. Enter/Release final rebate claims by August 1**
 - Enter June rebate claims in July in closing out school year.

- 2. Communicate with distributor**
 - Schedule a meeting with your designated sales person sometime between May & August. See Sample Agenda found on FNS website.

- 3. Set-up new commodity tracking form**
 - Locate tracking form on FNS website (Excel version will allow the form to be customize specific to commodities ordered)
 - Train appropriate staff to maintain the tracking form

- 4. Respond to Fall Preference Surveys. Plan to include the following:**
 - Review entitlement balance following the FNS reconciliation and carryover process
 - Take advantage of BONUS commodity or product surveys; new sponsors and those with a negative entitlement balance are eligible for bonus surveys
 - Review previous commodity orders before responding to the fall surveys to prevent over-ordering
 - Be aware of any new rebate products added in the fall; commit only to items currently purchased
 - Review CLiCS Commodity Never Ordered list resulting from Spring survey process to evaluate current needs

- 5. Plan your Winter Cycle Menu**
 - Include all rebate commitments and reprocessed items
 - Evaluate potentially “New” rebate products carried by distributor that are not currently being purchased

SAMPLE AGENDA

Meeting with Distributor Representative School Start - Up [Date]

Agenda Topics:

1. Define delivery schedule:
 - ❑ Regular delivery schedule: sites, days, frequency
 - ❑ Regular commodity delivery management from Newport Cold Storage
Such as invoicing, notification of deliveries or standard schedule, etc.
 - ❑ Any reprocessed commodities scheduled/expected
2. Provide copy of menus and discuss specifications for regularly used branded items and pilot items (best if a list is provided or a bid form is used).
3. Indicate quantities and dates of promotional, new, or special order items on your menu or menu cycle.
4. Review with your distributor a blank copy of your rebate claim screen from CLiCS. Discuss the following:
 - ❑ Quantity committed for each item
 - ❑ Purchase plan for menu cycle (number of cases per month)
 - ❑ Availability of items as stock or special order
 - ❑ Define order lead times
 - ❑ Identify items not available with distributor
 - ❑ Substitutions for pilot items
 - ❑ Distributor rebate claim uploads to MDE
 - ❑ Distributor velocity report to be provided monthly, if desired
5. Opening orders status (recommend opening orders placed at least one month in advance) discuss any discrepancies or shortages.
6. Provide school calendar and determine delivery dates during "No School" days.
7. Additional agenda items (i.e., method for placing orders: phone, fax, in-person, or electronic system)

FOOD PROCUREMENT QUARTERLY CHECKLIST
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Early Winter Quarter: October - December

1. Communication with distributor

- Any changes in ordering of rebate products due to using the flexibility within a rebate group
- Any approved rebate products to test for student satisfaction
- The holiday schedule including any changes in delivery

2. Submit and Release Monthly Rebate Claims in CLiCS

- Verify distributor upload of purchase records and release claims
- Enter rebate claims by either monthly invoice or rebate monthly

3. Track available rebate dollars and commodity deliveries

- Refer to the Rebate Claim Summary screen in CLiCS for rebate claim eligibility
- Track receipt of commodities received at your school(s) using the commodity tracking form
- Use delivery dates from CLiCS Customer Order Summary screen to track delivery dates of expected commodities

4. Plan for rebate and reprocessing opportunities

- Contact broker to sample new reprocessed products of interest
- Contact distributor to sample and evaluate new and existing rebate products
- Determine student satisfaction for new products

5. Plan Spring Cycle Menu

- Plan remaining approved rebate products into cycle

6. Plan to attend the Food Exposition

- Consider staff participation
- Review list of available commodities

FOOD PROCUREMENT QUARTERLY CHECKLIST

Commodity & Commercial Food Procurement Activities

Late Winter Quarter: January - March

1. Attend Food Exposition

- Review list of commodity reprocessed products and rebate commercial products available
- Investigate with Distributor availability of commercial rebate products
- Visit with FDP staff about the Food Distribution Program

2. Plan and Respond to Spring Preference Surveys

- Plan a basic Menu Cycle for next school year (optional)
- Determine usage of regular and reprocessed commodities
- Determine usage of commercial products approved for MN Rebate Program
- Anticipate year-end inventories for use next fall
- Place orders on preference surveys to reflect 80-90% of annual usage to prevent over ordering
- Confirm with Distributor availability of commercial rebate products on current product surveys
- Verify entries; assure that any required minimums are met for reprocessing
- Complete reprocessing order forms for brokers
- Determine distribution for reprocessed items

3. Continue Tracking Commodities & Rebate Products Through Year-End

- Assess commodity usage; compare to commodities yet to arrive by year-end
- Communicate with distributor/processor/broker any delivery discrepancies regarding regular and reprocessed items
- Review your Rebate Claim Summary screen in CLiCS and align rebate amount remaining with your purchase plan for the remainder of the year
- Use up any overages via menu planning
- Use rebate program flexibility to order other items within same rebate group
- Transfer excess commodities as needed

4. Plan Your Procurement Process for Next School Year

- Prepare proposals for next year (Use sample RFP and guidance found on FNS public website)
- Include rebate products as branded items on product list for vendors
- Prepare proposal for regular commodity distribution
- Plan your timelines so that a Commodity Distributor selection is made in CLiCS by May 16th

FOOD PROCUREMENT QUARTERLY CHECKLIST
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Spring Quarter: April - June

- 1. Administer next school years procurement process**
 - Prime vendor renewal or assess new proposals
 - Determine commodity distributor for next school year
- 2. Indicate Distributor on CLiCS Customer screen by May 16th**
 - Negotiate terms for delivery of commodities with distributor
- 3. Track and reconcile regular/reprocessed commodities**
 - Use Tracking Form to confirm final receipt of all commodities
 - Use Customer Order Summary screen to track commodities
 - Reconcile regular and reprocessed commodities
 - Contact distributor with commodity delivery discrepancies
 - Contact processor/broker for reprocessed commodity delivery discrepancies
- 4. Monitor Rebate Summary Screen**
 - Complete commercial purchases to use remaining rebate dollars
- 5. Finalize Fall Menu: Sept, Oct, Nov**
 - Meet with Prime vendor to detail service expectations
 - Provide menus and estimated order quantities to Distributor
- 6. Single Inventory Record Keeping**
 - Provide auditor with single inventory for all food products June/July
 - Receive Commodity Year-End Report for Auditor from FNS
- 7. Submit and Release Rebate Claims**
 - Make all commercial purchases by June 30th
 - Submit all rebate claims, even over commitment, by August 1st
 - If your distributor uploads rebate claims, plan for release of May claim in June and June claim in July