

State Panel: Managing the USDA Foods Ordering Process

Presented by:
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Overview

Oregon's Order Process and Timeline

Chris Facha

Program Analyst/FDP Coordinator, Oregon Dept. of Education

Managing the Ordering Process: Texas

Angela Hodapp

Ordering Specialist, Texas Department of Agriculture

USDA Foods Ordering – Connecticut Style!

Linda Hubeny


Food Distribution Program Director, State of Connecticut



Oregon's Order Process and Timeline

Chris Facha


Program Analyst/USDA Food Distribution Program Coordinator
Oregon Dept. of Education




Oregon Overview

- **SY 2015**
 - Approx. 300 RAs spread out over 9th largest geographic state in US
 - Approx. entitlement = \$13,596,950
- **Contracted Warehouse**
 - 1 Central Warehouse in Portland

Pre-Survey

- Pre-Survey in fall for next school year
 - October
 - Simple Survey Monkey sent out via e-mail
 - Allow RAs to choose preferences from full USDA Foods catalog
 - Ensures statewide feedback before pre-order
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USDA Foods Advisory Committee

- November
 - Committee of 25 RAs
 - Represent cross section of all Oregon RAs
 - Narrows down list from Survey Monkey
 - Ensures variety
 - Assists with full/near full truckload quantities
 - Allows for more in-depth RA feedback and discussion
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Pre-Order Request Driven Data System

- Opens in February and closes in March
- Calculate preliminary estimated entitlement for next SY
- RAs place pre-orders which draw against entitlement
- Choose what they want when they want:
 - Narrowed direct delivery list from Survey Monkey and Advisory Council—usually around 50-60 direct delivery products
 - Diversion products
 - DoD Fresh Produce allocations


Place USDA Orders

- March-April
 - After pre-order closes, consolidate products
 - Place orders
 - Split with other states when possible
 - Final results displayed in data system
 - Data system interfaces with WBSCM to download order details
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Order and Delivery-Direct Delivery

- First order period begins in early August
- RAs confirm pre-ordered food items in data system
 - System is dynamic
 - System is flexible
 - Manages entitlement balance
- First delivery begins end of August
- Seven Distribution periods (August, September, October, November, January, March, April)
 - Two delivery windows available per distribution period
 - Consolidated distribution periods leads to cost savings and RAs meeting 20 case delivery minimum
 - Average cost is \$3.00-\$4.00 per case

Order and Delivery-Diversion

- Approve any processor, any end product, all value pass thru systems
 - Publish annual processing catalog with SEPDS and processor/broker contact information
 - State tracks RA's pre-ordered pound balances against monthly performance reports
 - Carryover from prior year SY moved to state account after Dec. 31st of the next year SY
 - RA extensions beyond Dec. 31st allowed with reasonable usage plan
 - Ensures RAs are using their pounds
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Additional Pre-Order?

- September
 - Wait for final meal counts
 - Issue additional entitlement
 - Open additional pre-order period
 - Place additional USDA Orders
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Managing the Ordering Process

Texas

Angela Hodapp, Ordering Specialist



TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Texas Dynamics



- **NSLP Recipient Agencies
SY 2015**

- 1300
- 10 Direct Ship Schools

- **Contracted Warehouses**

- 6 Contractors
- 7 FDP Regions

TX-UNPS: Request Driven System



- **Connects with WBSCM**
- **SY 2016 Food Offerings**
 - 123 Regular USDA Foods
 - 5 DoD Farm to School, TEXAS grown items
 - 68 Bulk USDA Foods for further processing
- **DoD Fresh Program**
 - 700 participants

Entitlement

- **SY 2016**
 - Approximately \$160m
 - \$22.5m for DoD Fresh
 - \$2.5m for DoD Farm to School





Ordering Dynamics

- **January:**
 - Open NEW program year in TX-UNPS
- **January – March:**
 - Schools enter requests in TX-UNPS
- **March – May:**
 - Generate truckloads based on demand and logistics; submit orders in WBSCM

Managing and Tracking Orders

- **Daily to Weekly:**
 - Data import from WBSCM to TX-UNPS
- **August - May:**
 - Weekly allocations
 - Product delivered by contracted warehouses
 - Direct Ship – goes directly to the RA

Food Distribution Program



Weekly Commodity Bulletin

Texas Department of Agriculture
Food Distribution Program

Program Year: 2014 - 2015

Program: NSLP

Real Time Reports

- Weekly Commodity Bulletin
- Statement of Commodities Shipped
- Statement of Commodities Allocated

Account Status

Program Year 2015 Entitlement		Entitlement Usage		Entitlement Balance	
Beginning Entitlement:	\$36,086.79	Processing Reserved - Used:	\$12,371.04	Available Entitlement:	\$36,086.79
Rollover Entitlement:	\$0.00	Processing Reserved - Rem:	\$628.96	Entitlement Used:	(\$19,569.66)
		DoD Fresh Deduction	\$6,569.66	*Unfilled Requests:	(\$15,503.24)
Total Available:	\$36,086.79	Entitlement Allocations:	\$0.00	**Admin Adjustments:	\$0.00
		Total Entitlement Used:	\$19,569.66	Entitlement Remaining:	\$1,013.89
		Bonus Used:	\$0.00		

* Unfilled Requests include Regular USDA Foods and FTS products not yet allocated.

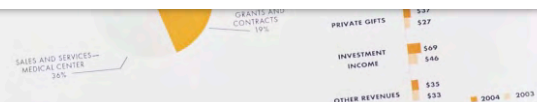
** Admin Adjustments will be identified as ADJ in contract entitlement usage screens.

Summary of Commodities in the Warehouse

Item Number	Commodity Description	PackSize	Storage Type	Total Units
100362	BEANS REFRIED CAN-6/10	6/#10 CAN	Drv	1

Managing Entitlement

- **Weekly –**
 - Review Entitlement Summary
 - Review Status Order Reports
- **Ongoing –**
 - Monitor RA entitlement usage, including DoD usage
 - Announce surplus offerings
 - Send email communication to schools
- **End of Year –**
 - Incorporate state year entitlement balance into rate of assistance



The following chart provides a breakdown of revenues supporting core activities for the fiscal year ended June 30, 2003.

Revenues to support UC Davis' core activities of over \$2 billion, including those classified as nonoperating revenues, increased by \$115 million in 2004.

USDA Foods Ordering – Connecticut Style!


Linda Hubeny

CT/Dept of Administrative Services

Food Distribution Program Director



USDA Foods Ordering – CT Style!

- **Request Driven – WBSCM rolled down to RAs**
 - RAs determine how to spend their **Planned Assistance Level (PAL)**
 - **80 + USDA Foods offered to RAs**
 - **RAs participate in USDA Foods – 230**
 - RAs participate in DoD – 120
 - **One State Contracted Commercial Distributor**
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USDA Foods Ordering – CT Style!

- **Entitlement**

- RAs use 100% + PAL

- 18% Beef

- 20% Cheese

- 22% Poultry

- 40% F&V (DoD & Direct Delivery)

USDA Foods Ordering – CT Style!

- **December**

- Create estimated entitlement worksheet using CT Dept of Education meal counts
- RAs allocate \$\$ to the DoD Fresh Produce Program

- **January/February**

- USDA Foods Available List shared with RAs
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USDA Foods Ordering – CT Style!

- **March**

- WBSCM Catalog filtered and opened for RAs
- USDA Foods they request most
 - Turkey Roast, poultry, beef, cheeses, canned fruits, frozen strawberry cups
- Annual Meeting and USDA Food Show
 - Worksheet with broker info, manufacturer, product name, product # and notes section
- New Director Training & WBSCM Training

USDA Foods Ordering – CT Style!

- **April**

- WBSCM Orders Due at the RA level
 - Work with other states to split trucks for Direct Delivery & Processing Diversion
 - Roll trucks up
 - Notify processors and state contracted distributor when trucks will be shipping to them (MS Excel spreadsheet reports from WBSCM with material information and RA information)
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USDA Foods Ordering – CT Style!

- **June**

- All cases must be out of the state contracted commercial distributor
- Year End Physical Inventory

- **July**

- Processors start receiving trucks of raw
- “March Across CT” – Meet with CT farmers at their farms
 - Increase CT Grown in DoD Program
 - Increase awareness of the Farm to School Program



USDA Foods Ordering – CT Style!

- **August**
 - State contracted commercial distributor starts receiving trucks
 - Contracted commercial distributor emails monthly reports to RAs
 - RAs begin receiving further processed end products from their contracted distributors

USDA Foods Ordering – CT Style!

- **Throughout the School Year**
 - “Swap Post” items available
 - Cases ordered at the state level either because they’re new items or to make truckload requirements
 - Monitor inventory at state contracted distributor
 - Monthly inspections
 - Daily shipping files
 - PI – Dec and June

USDA Foods Ordering – CT Style!

- **Throughout the School Year**

- Jan & Jun Child Nutrition Claim Adjustment (Paperless Billing – Admin Fees)
- FSMC reminders – Nov 15th File Price for monthly invoicing by disclosure

Processing

- Approve SEPDS & SPAs
 - MPR reconciliation
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USDA Foods Ordering – CT Style!


- **Communicate! Communicate! Communicate!**
 - Newsletter every 2 months
 - Emails – get point across in first 3 words of the first sentence
 - Include USDA, Advocates, Public Health, Education, Agriculture
 - And ask them to include me on their communications

USDA Foods Ordering – CT Style!

- **Train! Train! Train!**

- On site one on one technical assistance offered
 - 2 or 3 on site trainings per month
- New Director & WBSCM Training to enter WBSCM orders
- WBSCM Training manual available on our website

USDA Foods Ordering – CT Style!

- **Direct Delivery** – in warehouse less than 60 days
 - RAs order monthly using state contracted distributor on-line ordering system
 - Monthly Delivery
 - 12 case minimum
 - \$.80 per case Admin Fee
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USDA Foods Ordering – CT Style!

- **Processing**

- No Admin Fee
- Approve any processor, any end product, all value pass thru systems
- Carryover moved to state account on Nov 30th each year
 - If RA has plan to utilize USDA Foods we approve moving raw back into their account

USDA Foods Ordering – CT Style!

- **DoD Fresh Program**
 - No Admin Fee
 - RAs order in FFAVORS web
 - Weekly direct shipments to RAs

USDA Foods Ordering – CT Style!

- **What we're working on now**
 - Direct Delivery shipments to RA or distributor of their choice



Questions?



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