

**SPECIAL MILK PROGRAM (SMP)**

**Program Overview - Non-pricing Option**

This checklist is intended as a tool for schools that participate in USDA’s Special Milk Program (SMP), do not collect money for the milk program and claim all student milks in the Paid category.

If you have questions, contact a Nutrition Program Consultant Nutrition Program Consultant: <https://dpi.wi.gov/school-nutrition/directory#NPC>.

# Section I: Recordkeeping and Reporting

* Electronic or paper copy of most current SMP permanent agreement/policy statement is on file.
* Online contract changes are completed throughout the year as they occur.
* Milk/milk substitute receipts, billing statements and/or invoices that show amount of milk delivered each month (e.g., number of ½ pints, gallons), milk types delivered, and total cost of monthly milk purchases are on file for the past three years plus the current year.
* Daily point of service count of milk/milk substitute served to students for monthly claims.
* Monthly reimbursement claims are based on point of service (POS) counts obtained when the student receives the milk.
* Monthly claims do not include adult milks, milk used for classroom projects or cooking, outdated/wasted milk, or milk served to non-students.
* Record of income, expenses, and net cash balance for each school year.
* Records pertaining to the SMP are maintained for three years plus the current year.

# Section II: Financial Management

* Milk program revenue is used only for purposes related to the program.
* Milk/milk substitutes purchases are only expense paid with SMP funds.
* All SMP expenses are supported by receipts, invoices, payroll records, time study for labor when staff person has other job functions, and/or statement from utility company. Expenses are appropriately prorated, if applicable.
* Price for milk/milk substitute available to non-students (staff, visitor, volunteers, children not enrolled in school, etc.) covers per ½ pint cost from the milk vendor (there is no reimbursement to reduce their cost).
	+ N/A - Milk/milk substitutes are only available to students.
* The cash balance remaining on June 30, is carried over into the new school year and shown as the beginning fund balance on July 1.
* The current cash balance for the SMP does not exceed three-month’s operating costs unless the SFA has a plan for the accumulated balance, such as the purchase of new milk coolers.

# Section III: Purchasing

*Information and resources are posted on the* [*Procurement*](https://dpi.wi.gov/school-nutrition/program-requirements/procurement?rdt=) *webpage.*

* SFA documents efforts made to maximize open and free competition for milk and other SMP purchases by: ­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Making attempts to obtain three price quotations following the Micro or Small Purchase Methods. Note these methods may be used for purchases that are below the USDA’s and DPI’s simplified acquisition threshold (currently $3.500 for micro and $150,000 for small purchases). SFA may choose a lower threshold.
* Following formal bid procedures if purchases exceeded USDA’s and DPI’s simplified acquisition threshold (currently $150,000) or SFAs lower threshold.
* If competition is limited and less than two (2) bids or proposals were received, school documented reasons for limited competition. Example: Milk distributors who do business were contacted to ask why there was no response to pricing requests, the responses were summarized in writing and the summaries are kept with procurement records.
* SFA has a process to ensure products match those specified in the procurement documentation and the pricing in the awarded contract is reflected on invoices paid by the SFA.
* Milk coolers and other purchased equipment that is used by other organizations are purchased based on a pro-rated basis for the time the item is utilized by the SMP.

# Section IV: Milk Selection(s)

* Milk types are limited to different types for students at different age levels include: fat-free, low-fat (1%) milk, fat-free or low-fat lactose-reduced milk, fat free or low-fat lactose-free milk, fat-free or low-fat buttermilk, fat-free or low-fat acidified milk. A variety of milk types is not required for this program.
* **1 Year old:** Unflavored whole milk only must be served.
* **2-5 years old (not yet in Kindergarten):** Unflavored low-fat (1%) or fat-free (skim) milk is permitted. Flavored milk is not permitted for children two through five years old in a preschool setting. Students enrolled in kindergarten that are five years old may follow the NSLP milk requirements, which allows for fat-free (skim) or low-fat (1%) flavored or unflavored milk.
* **6 years old and older:** Flavored or unflavored fat-free (skim) or unflavored low-fat (1%) milk is permitted.

# Section V: Food Safety

* Pasteurized fluid milk which meets state and local standards (grade A in Wisconsin) is purchased.
* Milk deliveries are monitored to ensure milk is delivered in refrigerated truck and held at 45° F or less. Provisions must be made to ensure milk is cooled to 41**°** F within 4 hours, if at 45**°** F at time of delivery.
* “Sell dates” are checked on cartons or bulk containers and provisions are made to return or discard outdated product.
* Inventories of milk/milk substitutes are rotated on first-in, first-out basis.
* Adequate storage and proper refrigeration are provided to keep milk within a temperature range of **35° to 41°** F from delivery until milk is served.
* Provisions are made to serve milk directly from refrigerated milk cooler, insulated milk barrel or cooler or serve milk immediately after removing from refrigeration to minimize time it is left at room temperature.
* Unopened cartons of milk served to students and/or left at room temperature and/or not kept under mechanical refrigeration are discarded.
* Appropriate and accurate thermometers are kept in each milk refrigeration unit.
* Thermometers are checked for accuracy, re-calibrated or replaced, as needed.
* Temperature logs for each milk refrigeration units are recorded daily when school is in session.
* Appropriate action is taken when temperature registers above **41°** F. (etc., re-checking temperature within hour, following procedures for equipment maintenance/repairs) and noting action taken on temperature logs.
* Completed daily temperature logs are kept for a minimum of 6 months from the time the temperature was recorded.
* Routine cleaning of milk refrigeration units occurs to keep interior and exterior surfaces clean.
* Preventative maintenance schedules are followed to keep milk refrigeration units in proper working order and maintain adequate temperatures (accurate thermostat; coils, air filters and vents are kept clean; free of excess internal condensation, seals, latches, and gaskets in good condition).
* Single service items (straws, napkins, cups), if used, are properly stored in their original packaging (on shelves at least 6” off floor, in areas not exposed to splash, drips, or other contamination sources. Straws are wrapped or properly dispensed.
* Current license is obtained and on site when food service is under contract with a food service management company or receive meal/milk from a vendor.

# Section VI: Civil Rights

* The USDA non-discrimination statement is included on all SMP related information going out to households. Current non-discrimination statement is posted on the [Civil Rights](https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights) webpage.
* The *“And Justice for All”* poster is displayed in a prominent place visible (and readable) to program participants where milk/milk substitutes are served.
* Appropriate accommodations are made milk substitutions requests supported by medical statement signed by a state licensed health care professional (also referred to as licensed medical practitioner). In Wisconsin, this is anyone authorized to write medical prescriptions under state law and includes physicians, dentists, ophthalmologists, physician’s assistants, nurse practitioners, and podiatrists. A medical statement template and additional information is posted on the [Special Dietary Needs](https://dpi.wi.gov/school-nutrition/program-requirements/special-dietary-needs) webpage. The statement must be kept on file at the SFA.
* **Milk** substitutes provided for students without a statement signed by a licensed medical authority is at the discretion of the school and must be a nondairy beverage with same nutritional profile as cow’s milk. (Prior approval by DPI is required to claim milk substitutes for reimbursement.)
* SFA provides annual Civil Rights training for front-line staff/volunteers and maintains appropriate documentation beginning with the 2016-17 school year. Note: [Power point presentation](https://dpi.wi.gov/sites/default/files/imce/school-nutrition/smp-civil-rights-presentation.pdf) and [attendance record](https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/civil-rights-training-attendance-record.doc) posted on the [Special Milk Program](https://dpi.wi.gov/school-nutrition/programs/milk-programs/special-milk) webpage under SMP only requirements.
* SFA completes annual Civil Rights Compliance Self Evaluation (PI-1456) for SMP Only Schools form.