What state are you with?		What are the challenges that your RAs report in utilization of pounds in the same SY allocated?	What i) does	your St	ate swe	ep / re							
State	Open-Ended Response	Open-Ended Response	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Comments:
AK		So many canceled orders in SY22. A lot of schools did not divert for SY23, ordered direct USDA Foods (commodities) instead.					х								
AL	Unfortunately, due to the limited amount of processing we do in this state, we do not have any suggestions to offer regarding sweeps. All of our pounds are managed at the state level and kept in a state account at the processor level.	None													N/A
AR	the best practices for state agencies looks good, would like the wording to include doing sweep before June 30th. For example, AR has to have all	Arkansas RA's have not reported many issues in the past few years. A main issue was available supply in the last two years. On the other hand pass issues where RA's not forecasting or monitoring their usage or students not liking the items and RA's being slow to communicate with the manufacturer.						x							Although all states have different sweep policies, it would be really nice if we all agreed to one general policy. Do you think that will ever happen? Overall, I think the guide is a great resource. Hats off to the committee for all the awesome work done and presented.
AZ		COVID and Supply Chain Disruptions. Cannot get End Product.		X			x						x		As mentioned above, this did not happen since 2020, but moving forward in SY 22-23, these months will be sweep months.

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	Asking the USDA to have a blanket decision on carry-over will cause more problems. There needs to be more training for RAs on how to use pounds as well as a constant conversation on what is happening in the market. The USDA had to step in and deal with the excess pound issue in 2021. I understand why they had to do it, but it impeded some states from using all of their entitlement and getting products into their state because they had to ask for pounds from states that had too much. Having a national policy will also prevent states to have any control if there are supply chain issues. As we have seen with the waivers that all expired it takes a long time to change regulation once it is in place.	The missing component is the distributors. Some distributors report nightly sales and others report once a month 15 to 20 days after the month closes. This causes a significant problem because pounds that are actually used don't show up on MPRs until months after the sale. When June comes around the distributor is still slow in reporting and then once the pounds are swept the distributor comes back to say those pounds were used. If any policy needs to be made at the federal level we need the distributors to have more accountability in this process.		x		Pre COVID we had the balances down and most RAs using their pounds by the end of the year. If they were not the RAs knew the pounds would be swept after June 30th. It is looked at just like Entitlement or DoD funds. If you don't use them by June 30th they are lost and put in the big state bucket. Since COVID we rolled over for 2021 for the RAs to use pounds the following year but we also had a second round of ordering because there was no way to predict what would happen 6 months in advance. This prevented RAs from ordering too much in the first round and they were able to assess their needs as the SY was starting. This was a lot of work on the state side and it could be said that it is easier to cancel truckloads than do another round of ordering. At the end of 2022, we had every RA request to carry over pounds with a plan so we could clear any balance that the RA can't use. These pounds have to be used by September 30th but we have already received information from processors that products won't be available until January. We have to look at each manufacturer to see if they are producing, and each RA to see if they are ordering correctly. Brokers are also key to this equation. We use them to ensure pounds get used because it is their sale they lose if we have to move pounds to other states.
GA	Excellent compilation of information. Seems the issue is not specific to one process or one state.	Processors provide the calculation documents to the RAs for the number of pounds needed. We have found them to be rather heavy sided and actually less product could be allocated to the processor. We don't intervene but ask the RA to be wise and understand their responsibility in the process. Unavailability of product this past year, typically	x			As a state, we welcome a federal or regulatory sweep process. This has become a hot topic and RAs think the pounds "belong to them". We have become the "bad guy" as we take away their pounds. They don't understand the full picture and might not ever. Having a set standard for when the sweep occurs would be helpful.
	My state has swept at the end of every school year for as long as I know, so it's a practice we employ currently and intend to continue.	it's they purchase the wrong product unintentionally or don't forecast accurately in the first place.				With a statewide single bank we no longer need to sweep throughout the year, but previously we did October and then Jan/Feb in addition to the end of the year.
ID	Idaho implements a June 30 (annually) sweeps of all RAs with unused pounds of raw bulk materials. We do allow exceptions on a case by case basis only with valid justification and plan set forth for the coming school year by any RA requesting an exemption. Our Sweeps practice allows for redistribution to other RAs and ensures quick draw down for unused pounds at the start of the coming school year. The SDA reviews pounds being held at each RA prior to placing requisitions in WBSCM (Feb/March) for the coming school year and uses that information to reduce the number of truckloads being requisitioned if usage was lower than expected. During the COVID years, usage issues have not just been about RAs not properly forecasting. Many processors have reduced their available product lines (particularly difficult was lack of access to dark meat chicken products for SY21-22). Lead times have made it difficult for RAs to plan and unavailable products due to supply chain issues left RAs paying commercial pricing for products they could not get with their raw bulk materials pounds at processors.	Changes in available product lines, long lead times, and typically most issues result when unanticipated and untimely staff turnover occurs. Idaho has seen a nearly 40% turnover rate in food service directors in the past two years.		x x		Sweeps June 30 - Redistribution begins July 15

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IN		The challenge mentioned most of the time is the processor discontinuing end products being utilized by the schools. The discontinuation of end products result in pounds being unused. These unused pounds will result in additional carry over to the next school year.						x							Schools are always encouraged to utilize all pounds within the designated school year. When the schools have a remaining balance of unused pounds at the end of the school year, they are encouraged to take these unused pounds into consideration when requesting additional pounds for the upcoming new school year.
LA	We currently do what the sweep subcommittee suggests so I have no further comment.	Manufacturers changing prices or discontinuing items they originally were awarded. Many RAs are less than motivated to change menu for new or substituted item (they need to be more flexible considering supply chain issues).	1					x							
MA	In Massachusetts we sweep at the end of the year and use those pounds towards the next school year's allocations. We also monitor pounds monthly and move pounds due to usage or lack of.	Distributors not having items have been a great challenge to our RA's, also white/dark meat pounds is always a challenge.						х							
	Maryland offers the following suggestions: 1. Change After June 30th to when June MPR is received. 2. Change redistribute all inventories into State accounts to redistribute inventories to RA and State account as usage warrants. Do the states that have challenges with inventory management utilize the single bank system and does that lead to the challenges? Maryland is very satisfied with our processor inventory management and is willing to share any best practices	SKUs being reduced and/or eliminated Finished goods not being produced Menu changes Incomplete orders not communicated Shortages/mispicks Late trucks Labor issues which dictate menu changes and/or result in warehouse and transportation problems Incorrect or lack of forecasting Incorrect ordering procedures/amounts States ordering more for full truckload amounts when unable to find a partner.		х	×	x	x	x	x	x	x	x	×	x	We think there is some confusion in the terminology being used. Maryland considers a sweep to be the activity we do after receiving the June MPR, redistribute inventory, and notify processors, brokers, and RAs of their allocations. So we do one "sweep" per year. Maryland transfers pounds between RAs and to and from the State account as needed throughout the school year almost on a weekly basis to cover unanticipated usage spikes, failed transactions, truck cancellations, and truck shortages. Lately every truck of liquid eggs, flour, tomato paste, and cheese from processors not on the perfect truck program has arrived short so allocations have to be adjusted.
MI	Michigan utilizes a single-bank system so a sweep process is not required.	1) supply chain issues 2) trying a new processor (le committing to a truck of food that might not be accepted by SFA's) 3)changes in program requirements that might make some processed foods less needed/desirable													
MN	Minnesota's sweep policy is fine. Sweeps are performed 2x/year. Pounds are managed and redistributed as needed.	Supply and demand. You cannot drawdown on pounds if processors cannot deliver the product. That was the challenge for SY22.				x						x			
1	Sweeping every June 30th is our current practice however it was decided for this year we would allow pounds to carryover. I think it would be a good idea if there was a standard sweeps policy that every state followed. It would make things more easier on states as well as manufacturers.	The biggest challenge is the supply chain. Distributors not bringing in products, manufacturers not making the products that were awarded, or discontinuing products altogether which results not being able to drawn down inventory. Some shipments may not be received until later in the year which may not give enough time for utilization.						x							

ND	ND has nine districts that participate in NOI. ND sweeps the pounds on May 31, approximately one week after school is out. Overall the districts utilize their pounds. Setting a sweep policy encourages districts to utilize their	In ND we don't have too many challenges. The supply and demand issues brought on some													
NJ	pounds before school is out.	challenges.					Х								31-May
143			х												
NM	Proper RA Forecasting and menu planning. Communication between RA, Processor and SDA. Implementing a firm sweeps policy.	Product availability						x							On or before June 30th of every year. Sweeps can be completed after all orders are received for the year.
NY	NYS already sweeps on June 30th to reallocate all swept pounds from the state account to orders the following school year to assist schools. We also sweep in January to get a clearer picture of how the schools are doing and what kind of balances our state account truly has to utilize. In this way schools who are not using and don't submit a "Do not sweep" detailed plan about how they plan to use their pounds are reallocated to other schools who may need more. In this way we make sure everyone has what they need and that our balances stay in acceptable ranges for USDA monitoring.	Until COVID hit there weren't many challenges, but now due to supply chain issues, lead times, and labor shortages many schools are having trouble utilizing pounds they ordered as there isn't enough product to go around.	x					X							
ОН	Justification letters are important but should not be used simply as an apology. Needs to include a solution to get under 6 MOI.	Product availability through distributors; poor planning compounding forecasting errors acros: multiple years; lack of knowledge of calculators and other available resources.	x	х	x	X	х	x		x	x	х	x	x	Redistribution is a rolling process for each school month.
ОК	We already do this but we also monitor throughout the year and any district below par we asked to voluntary sweep lbs.	Product changes outside of bid specs and most of our districts are NOI and distributor have issues with keeping needed products on stock.			х			х						х	June is the only mandatory no exceptions sweep.
PA	This is a an incredibly thorough document and i like that every stake holder has a best practices section, the processors responses are very helpful in how we plan this as a state.	Current challenges mostly center around supply chain and distributor issues. ordering accuracy and director changes also have a big effect on pound utilization.	x						x				x		20% at the end of October 50% at the end of January and full sweep at the end of June
TN	TN is in the process of transitioning to the practice recommended on page 10 of the ACDA Sweeps Policy. In February, RAs were notified that inventories remaining after June 30, 2023, will be swept into the state account for use by other RAs unless the RA has submitted to the SDA a plan showing estimated monthly usage that will result in a zero balance of carryover by Oct 31, 2023. In Spring 2023, as requests are being gathered from RAs for SY24, this policy will be fine tuned for SY24 to include a timeline for steps to be taken at key points throughout the school year to work with schools whose balances are not on track to meet the goal of 100% usage.							x				x			
TX	Recommend a national policy developed in coordination with ACDA. Just how ACDA streamlined or developed the state participation agreement and monthly reports. Processors are dealing with too many states to implement 50 different methods for dealing with excess inventory.	Supply Issues / product not available - #1 issue. Distributors subbing product Lack of communication or up to date communication from processors to the schools about discontinued items.						x							
UT	Utah consulted the best practices document when putting together its new usage/sweep policy for SY22-23. This document was extremely helpful!	Lack of forecasting, inventory and usage management skills, and inflexibility with product substitutions on the RA's part are some things that our state has seen, particularly the last two school years. Additionally, RAs have expressed difficulties in getting end products due to supply chain issues.						x							Starting in SY22-23, our state will sweep pounds twice a year: December 31 and June 30. December sweep will be based on usage percentage, and all unused pounds as of June 30 will be swept to the state account.

VA	Virginia does not sweep and approve of a sweeping into a state account. Our state allows the schools to place their order. Sweeping creates additional paper and tracking. Our state do not wish to make the preprocessing more difficult by creating paperwork. Virginia has a process in place that sweeps as needed.	Out of stock items at Vendors. Poor coummication from vendors. Vendor intentionally not releasing commoidties for rebate forcing sweep at local distributors due to not products available. (Pizza Companies)	x	x	x	x	x	X	x	x	x	x	x	Virginia has a system in place to fill all orders as needed, which creates a system of constant sweeping through out all twelve months. Redistibuton should only be happening when there are to be placed. Sweepung equals paperwork.
	Wisconsin has redistributing all RA inventories into the State accounts to be used for new school year's allocations for 3 years. We have found this productive in decreasing the amount of swept pounds each year.	Product availability and cost fluctuations affecting product usage. Also challenges at distributors to obtain processed products timely as needed. Turnover in the management at the school level creates challenges as new SFA learn the USDA foods program and products to utilize.						x						Pounds are swept in June. Balances of state accounts are reviewed along with pounds on order to determine if orders could be canceled, based on pounds available from sweep. This step has been most productive to decrease state account pounds for the following year.