



## Indiana Department of Education

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Dr. Katie Jenner, Secretary of Education

### **Preparing for the Pre-Order (Forecast) Survey**

*An Indiana Department of Education (IDOE) Brown Box to Bulk Special Edition*

It is nearly time for schools on the National School Lunch Program schools to complete the annual pre-order (forecast) survey. The survey must be completed by schools annually to enter the U.S. Department of Agriculture (USDA) Foods (commodity) requests for the 2025-2026 school year.

The survey determines which foods will be delivered to the state-assigned warehouses and/or approved processors. Schools must complete the survey annually by the deadline in order to receive USDA Foods. The survey will open in early 2025 based on USDA's catalog open and close dates.

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### **Planning Ahead**

As school food service professionals continue to face challenges and uncontrollable factors, it is important to plan ahead. IDOE will collect pre-order (forecast) survey data to determine which USDA Foods will be ordered. IDOE orders are based on sufficient school demand, meeting full truck load requirements, and the number of trucks required to be ordered from USDA. IDOE's pre-order survey determines product demand, contracts with the vendors that prepare the USDA Foods, and if product cancellations are necessary.

**What is the Annual Pre-Order Survey?**

The annual pre-order (forecast) survey is mandatory for all schools that wish to participate in IDOE's Food Distribution Program (FDP) and receive USDA Foods (commodities). Schools spend their planned assistance level (PAL, or entitlement) and make food choices for the next school year based on school menus. Both direct delivered (brown box) sent to schools by state-assigned warehouses and USDA Foods for Processing (bulk pounds) sent to processors are completed on the same survey.

### What is Planned Assistance Level (PAL)?

PAL is the amount of funds available to schools to purchase USDA Foods. PAL is based on the number of lunches served during the previous school year multiplied by USDA's per-meal rate. IDOE recommends that schools spend up to 102% of their PAL. PAL allocations can be found under the school's entitlement tab in [CNPweb](#).

There are three ways to spend PAL. It can be diverted to the USDA Department of Defence (DoD) Fresh Fruits and Vegetables Program, Direct Delivery (Brown Box), and/or USDA Foods for Processing.

### How Do I Get Started?

To complete the survey, schools must be part of the National School Lunch Program and FDP and have submitted/plan to submit reimbursement claims for at least one school year. The survey must be completed under the Surveys tab in the FDP link in CNPweb for the 2025-2026 school year, which is program year 2026.

## **Preparing for the Annual Pre-Order Survey**

### **Check School Menus**

A school's menu should guide USDA Foods orders, with cycle menus being an effective tool for meal planning due to their recurring nature.

### **School Food Authority (SFA), Food Service Director (FSD), and Food Service Management Companies (FSMC) Collaboration**

SFAs are the owners, authorities, and the responsible party for all USDA Foods. There must be collaboration between SFAs and FSMCs for all survey and USDA Foods choices, inventory management, and food decisions.

### **Forecast**

Analyze past and present data to make effective USDA Foods decisions. Click [here](#) for information and resources regarding forecasting.

### **Inventory Management**

- Know where inventory is located and how much is available at all times.
- Avoid over ordering and duplicate ordering.
- Use the first-in, first-out (FIFO) and first expired, first out (FEFO) rotation method.
- Only order as much as the school can use within one school year. USDA Foods are intended to be used in the year they are ordered.

### **Monitor Inventory at the State Contracted Warehouses, Processors, and On-Hand to Prevent Duplication**

- Monitor brown box items by checking the product drawdowns under the Surveys tab in [CNPweb](#) and the current products listed under the Inventory tab.
- Log in to third-party commodity tracking companies like [K12 Foodservice](#) and [Processor Link](#). For questions regarding end products for bulk processed items, contact the [Processing Company Brokers and Manufacturers](#) . If you

are not sure whether your school has products at the processor, contact [Cheryl Moore](#), IDOE Food Distribution Specialist.

### **Check Previous Surveys & Review Historical Data**

SFAs previous surveys are organized by program year under the *Surveys* tab in the [CNPweb](#). Use historical information such as production records, previous annual pre-order surveys, and cycle menus before making survey requests.

### **Procure All Processors**

Schools must procure ALL processors before identifying them on the survey. For more information on procurement, contact IDOE at [scnprocurement@doe.in.gov](mailto:scnprocurement@doe.in.gov).

### **Complete Optional Worksheets and Training**

- [Worksheets](#)
- [Training](#)
- [USDA Foods Entitlement Forecast Report Form](#)

## **Annual Pre-Order Survey Tips**

SFAs must ensure that the survey is completed by the deadline. To prepare, verify that PAL dollars diverted to the USDA DoD Fresh Fruit and Vegetables Program are listed correctly under the Entitlement tab in CNPweb. The deadline to make USDA DoD Fresh commitments was Friday, December 13. As a reminder, IDOE recommends that schools spend up to 102% of its entitlement. This provides a cushion for USDA Foods in case USDA has cancellations. Order USDA Foods in items and amounts that your school can use in one school year.

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[IDOE's Food Distribution webpage](#)

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