

What to Expect:

National School Lunch Program Procurement Review



Health and Nutrition Services
Arizona Department of Education





Disclaimer

This training was developed by the Arizona Department of Education (ADE) Health and Nutrition Services Division (HNS). The content in this training is intended for professionals operating one or more USDA Child Nutrition Programs in Arizona under the direction of ADE. The information in this training is subject to change. Attendees are encouraged to access professional development materials directly from the training library to prevent use of outdated content.

Intended Audience

This training is intended for all **School Food Authorities (SFAs)** operating the **National School Lunch Program (NSLP)** receiving a **Procurement Review (PR)**. All regulations are specific to operating the NSLP under the direction of ADE.

Objectives

At the end of this training, attendees will:

- understand the State agency monitoring requirements for SFAs undergoing a PR;
- know what to expect from the PR process;
- be familiar with all formal correspondence that will be initiated by the Procurement Reviewer; and,
- understand potential review outcomes and actions to be taken after the review.

TRAINING HOURS

Information to include when documenting this training for Professional Standards:

Training Title: What to Expect:
National School Lunch Program
Procurement Review

Key Area: 3000 - Administration

Learning Code: 3260

Length: 30 Minutes

Quiz Time



Throughout this guide, there will be comprehension quiz questions to test your knowledge and help you apply what you're learning. Be sure to review these quiz questions and answers available within the guide.

The question mark icon below will indicate a comprehension quiz question.



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Section One:

State Agency

Procurement Monitoring

Requirements



Intent of the Procurement Review

The Procurement Review (PR) is set in place to ensure program compliance and for State agencies to provide technical assistance.

The intent of the PR is to:

- determine if program requirements are being met;
- provide technical assistance specific to the SFA;
- and help SFAs determine how corrective action will be implemented into their operation to assure technical assistance is understood and impactful

Requirements of the Procurement Review

To conduct a PR, the State agency must gather documentation from the SFA to assess compliance with State and Federal procurement requirements.

Documentation requested will include current procurement policies and procedures followed by the SFA as well as procurement documentation from the previous school year.

For example, a PR conducted in School Year 2025-2026 will require:

- Documentation demonstrating the SFA's **current** procurement policies and procedures
- Documentation from procurement activities conducted throughout the **previous school year** (School Year 2024-2025).

Procurement Review

All SFAs operating the National School Lunch Program (NSLP) will receive a Procurement Review within 5 program years of their previous Procurement Review.

The Procurement Review will be conducted in the same school year as the NSLP Administrative Review; however, while the NSLP Administrative Review will be conducted both off-site and on-site by a State agency reviewer, the Procurement Review will be conducted fully off-site by a third-party entity (Myers and Stauffer).

The Procurement Review may or may not overlap with the timing of the Administrative Review.

Scope of the PR

GENERAL PROCUREMENT PROCEDURES AND SELECTED VENDORS

During a PR, both general procurement procedures and selected vendors must be reviewed.

GENERAL PROCUREMENT PROCEDURES:

The review of general procurement procedures will require the SFA's current written code of conduct and written procurement procedures.

SELECTED VENDORS:

The review of selected vendors will require documentation from the previous school year such as invoices, cost/price analyses, solicitation documentation, evaluation documentation, awarded contracts, and descriptions of contract oversight.

Procurement Review

During the PR, Myers and Stauffer will review purchases made from the nonprofit school food service account during the previous school year.

The following types of purchases are included in the PR:

- Micro purchases
- Simplified acquisitions (formerly referred to as small (informal) purchases)
- Formal purchases
 - Requests for Proposal (RFP) and/or Invitation for Bid (IFB)
 - Includes Market Basket Analysis and Group Purchasing Entities
- Food Service Management Company (FSMC) contracts
- Processing contracts

Selection of Vendors to Review

A sample of vendors must be selected to review procurement documentation for depending on the number of the vendors utilized in each procurement category during the previous school year.

The Myers & Stauffer Reviewer will use the chart to the right to determine the greatest number of vendors to review per procurement category.

TYPE OF PROCUREMENT	GREATEST NUMBER OF VENDORS TO SELECT
Micro Purchases	3
Simplified Acquisitions	4
Formal Purchases	5
FSMC Contracts	All
Processing Contracts	4

Quiz Time

True or False: All SFAs receiving an NSLP administrative review in the current school year will receive a procurement review.

A True

B False



Quiz Time

True or False: All SFAs receiving an NSLP administrative review in the current school year will receive a procurement review.

A True

B False

Notification is sent to the Superintendent Contact and School Food Authority Contact listed in the most recently submitted CNPWeb Sponsor Application.



Section Two:

The Procurement Review Process



Scheduling the Procurement Review

Procurement reviews will be conducted during the months of **September through May** for schools that are up for review during the School Year. SFAs will be notified **at least 2 weeks prior** to the first documentation deadline.

The notification will include:

- SFA Procurement Tool
- Required Phase 1 Documentation and Deadline
- Reviewer Contact Information

Official Notification of the Procurement Review

In July/August, all SFAs up for review will be notified of the upcoming review via email.

The [Administrative Review Schedule](#) can be found on the NSLP and SBP webpage under the 'Reviews Conducted by the State Agency' accordion.

- All SFAs receiving an NSLP administrative review will also receive a procurement review.

Assigned Procurement Reviewer

HNS has contracted with Myers and Stauffer (Certified Public Accountants) to conduct procurement reviews for NSLP.

Myers and Stauffer will contact SFAs regarding their procurement reviews.



Ensure all contact information in CNPWeb is current, especially if the SFA has experienced turnover.

Notification of the Scheduled Procurement Review

At least two weeks prior to the first documentation deadline, a Myers and Stauffer Reviewer will notify the SFA that the procurement review has been scheduled via email. The Myers and Stauffer Reviewer will provide two PR documents:

- **Confirmation Memo & Checklists** — Outlines the details of the PR and lists documentation required to be submitted to the Myers and Stauffer Reviewer prior to the communicated deadline.
- **SFA Procurement Tool** — Required to be completed by the SFA and returned to the Myers and Stauffer Reviewer with information about the SFA's purchase of goods and services from the previous school year.


If there are any questions regarding the documentation requested, please reach out to the reviewer for assistance.

Confirmation Memo

The intent of the Confirmation Memo is to provide an overview of the review process. Included in the Confirmation Memo is the Phase 1 Documentation checklist that lists documentation needed to be sent to the reviewer by the provided deadline.

It is important to note that a Phase 2 checklist will be provided after Phase 1 documentation is received and reviewed.

The Myers and Stauffer Reviewer will provide the Confirmation Memo via email to the SFA's Superintendent Contact and SFA Contact at least 2 weeks prior to the Phase 1 Documentation deadline.

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[DATE]

[SUPERINTENDENT CONTACT NAME & TITLE]
[SFA CONTACT NAME & TITLE]
[SFA NAME]
[SFA MAILING ADDRESS]
[CITY, STATE, ZIP]

Re: Procurement Review, Phase 1

Dear [SUPERINTENDENT & SFA CONTACT NAMES]:

The Arizona Department of Education (ADE) has engaged Myers and Stauffer LC to conduct procurement reviews on behalf of ADE. This letter is notification that, [INSERT SFA NAME] is required to partake in a procurement review of the School Nutrition Programs during the 2025-2026 school year. This procurement review will consist of a review of procurement activities conducted in **Fiscal Year 2025**.

The procurement review assesses compliance with federal and state regulations in relation to general procurement practices, micro purchases, small purchases, formal procurements, food service management companies, and processing as applicable, in order to confirm that the federal funding received is being used effectively. Additionally, the procurement review provides an environment to provide School Food Authority (SFA)-specific technical assistance.

Please review and complete all enclosed documents:

- **SFA Procurement Tool** will provide the reviewer with information necessary to determine what specific procurement documentation will be required in the Phase 2 documentation.
- **Required Phase 1 Documentation** checklist outlines the documentation that should be organized and sent to Myers and Stauffer by [PHASE 1 DEADLINE].

All requested documents should be submitted directly to Myers and Stauffer.

Please note Myers and Stauffer will request further documentation in a separate Phase 2 request that will be based on the information submitted in Phase 1.

It is recommended that SFAs receiving a procurement review notification complete ADE's online course, *Procurement Basics*, which is housed on our website at: <https://www.azed.gov/hns/nsip/training> under the "Procurement" accordion.

If you have any questions regarding the review, please contact [CONTACT NAME] of Myers and Stauffer at [REVIEWER'S PHONE #] and/or [REVIEWER'S EMAIL ADDRESS].

Sincerely,

Tom Horne, Superintendent of Public Instruction
1535 West Jefferson Street • Phoenix Arizona 85007 • www.azed.gov
"We are a service organization committed to raising academic outcomes and empowering parents."

Confirmation Memo

Vendor Paid List

Each SFA must provide an accurate and complete Vendor Paid List for the Procurement Review. The Vendor Paid List must list all vendors paid by the nonprofit school food service account during the previous school year and should align with vendors listed in the SFA Procurement Tool.

If all vendors are not reported, this can lead to additional documentation being requested later in the review process.



Best Practice: Provide a system-generated report (summary of expenditures) that lists all food service transactions from July 1 – June 30 of the previous school year.

Expenditure Detail							
July 2023 - June 2024							
Expenses							
6810 Dues & Fees							
	9/22/2023	Check	County Health Department	NSLP		350.00	350.00
	12/19/2023	Check	County Health Department	NSLP		145.00	495.00
Total for 6810 Dues & Fees						\$ 495.00	
510 Food Service Program							
6570 Lunch expenses - NSLP							
	8/3/2023	Check	Catering Company LLC	NSLP	July Meals	973.75	973.75
	9/5/2023	Check	Catering Company LLC	NSLP	August Meals	1,200.03	2,173.78
	10/12/2023	Check	Catering Company LLC	NSLP	September Meals	1,905.89	4,079.67
	11/10/2023	Check	Catering Company LLC	NSLP	October Meals	1,459.48	5,539.15
	12/13/2023	Check	Catering Company LLC	NSLP	November Meals	1,798.53	7,337.68
	1/15/2024	Check	Catering Company LLC	NSLP	December Meals	1,509.70	8,847.38
	2/3/2024	Check	Catering Company LLC	NSLP	January Meals	1,843.33	10,690.71
	2/15/2024	Check	Catering Company LLC	NSLP	February Catering Event	190.00	10,880.71
	3/17/2024	Check	Catering Company LLC	NSLP	February Meals	2,108.41	12,989.12
	4/9/2024	Check	Catering Company LLC	NSLP	March Meals	1,908.08	14,897.20
	5/5/2024	Check	Catering Company LLC	NSLP	April Meals	2,001.11	16,898.31
	6/5/2024	Check	Catering Company LLC	NSLP	May Meals	1,126.32	18,024.63
Total for 6570 Lunch expenses - NSLP						\$ 18,024.63	
Total for 510 Food Service Program						\$ 18,024.63	
Total for Expenses						\$ 18,519.63	

*Sample Vendor Paid List

SFA Procurement Tool

The Procurement Reviewer will provide the SFA with an Excel Procurement Tool. This Excel tool must be completed and provided to the Reviewer.

Information to gather prior to beginning the tool:	
Did the SFA pay a vendor that was procured through the ASPIN/MOHAVE cooperative?	<i>If yes, these ASPIN/MOHAVE vendors should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table. Please enter information in columns A-J and enter the name of the vendor (e.g., Shamrock Foods, Shamrock Farms, etc.), not "ASPIN/MOHAVE", in the vendor name column (column A).</i>
Did the SFA use a Request for Proposal or Invitation for Bid to procure a vendor even if the dollar value paid during the year to the vendor was less than the Simplified Acquisition Threshold?	<i>If yes, then the vendor should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table. Please enter information in columns A-J.</i>
Did the SFA procure a vendor for a service that is paid with both NSLP funds and non-NSLP funds? Some examples 1) a waste management contract for the entire SFA including cafeteria and all other areas of schools 2) the purchase of computers for the entire SFA including the cafeteria as well as classrooms.	<i>If yes, the method of procurement for the service must be considered and not simply the dollar amount paid with NSLP funds. For example, if \$9,000 of NSLP funds was spent on cafeteria waste management but the waste management vendor was procured through a Request for Proposal (RFP) then the vendor should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table.</i>

Checklists

The page following the Confirmation Memo includes the Phase 1 Documentation checklist containing the required documents needed to begin the procurement review. Once Phase 1 documentation is received, the SFA will receive a Phase 2 Documentation checklist. Each phase will have a unique deadline for the SFA to submit incrementally rather than all at once.


- **Phase 1:** Vendor Paid List, SFA Procurement Tool, Procurement Procedures, Code of Conduct, and FSMC Procurement Packet (if applicable)
- **Phase 2:** Invoices/receipts, solicitation documentation, vendor responses/quotes, evaluation of vendors, contracts, contract oversight descriptions, and Buy American Provision procedures (as applicable) for selected vendors

Documentation must be submitted electronically.
 Appropriate methods of transmission to Myers and Stauffer are as follows:

1. **Secure File Transfer Portal (SFTP) (Recommended):** Upload electronic files to the Myers and Stauffer LC SFTP site. Please contact Myers and Stauffer immediately so that a secure account can be created for you.
2. **Secure Email:** Send electronic files through a secure email to [INSERT REVIEWER EMAIL].

Phase 1 Documentation Checklist
 To be submitted by **[PHASE 1 DEADLINE]:**

1. A copy of the Vendor Paid List/Summary of Expenditures for School Year 2024 -2025.	<input type="checkbox"/>
2. A completed SFA Procurement Tool (in Excel format) for School Year 2024 -2025.	<input type="checkbox"/>
3. A copy of the SFA's current	<input type="checkbox"/>
4. A copy of the SFA's current	<input type="checkbox"/>
5. A completed Food Service	<input type="checkbox"/>

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Phase 2 Procurement Documentation Checklist
 *Additional documentation may be requested
 Please send the following records to [Reviewer's Name] at [Reviewer's Email] or through ADE's Secure File Delivery System by [DATE]:

MICRO PURCHASES	
Selected Vendor(s): [SELECTED MICRO PURCHASE VENDOR(S)] Review Period: July 1, 2024 – June 30, 2025	
1. Copies of 3 receipts/invoices	<input type="checkbox"/>

SMALL PURCHASES	
Selected Vendor(s): [SELECTED SMALL PURCHASE VENDOR(S)] Review Period: July 1, 2024 – June 30, 2025	
1. Solicitation documentation a. Include specifications of needed goods, products, and/or services b. Include evaluation criteria	<input type="checkbox"/>
2. Responses to solicitations a. Include copies of quotes	<input type="checkbox"/>
3. Evaluation of responses/quotes used to select vendor	<input type="checkbox"/>
4. Copy of contract if applicable	<input type="checkbox"/>
5. Copies of 3 rec	<input type="checkbox"/>
6. Contract perform a. Include the term orders b. Include approv	<input type="checkbox"/>
7. For food purch requirements w	<input type="checkbox"/>

FORMAL PURCHASES	
Selected Vendor(s): [SELECTED FORMAL PURCHASE VENDOR(S)] Review Period: July 1, 2024 – June 30, 2025	
1. Pre-solicitation cost/price analysis	<input type="checkbox"/>
2. Solicitation documentation a. Copy of original Invitation for Bid or Request for Proposal b. Copy of advertisement/publication	<input type="checkbox"/>
3. Responses to solicitations a. Include copies of bids/offers	<input type="checkbox"/>
4. Evaluation and scoring results used to select vendor a. Include when and where bids were opened (IFB only)	<input type="checkbox"/>
5. Final contract awarded a. Include contract notification documentation	<input type="checkbox"/>
6. Contract performance management documentation a. Include process for ensuring the awarded vendors performed in accordance with the terms, conditions, and specifications of their contracts and/or purchase orders b. Include what oversight exists to ensure vendor was satisfactory prior to approving invoices for payment	<input type="checkbox"/>
7. Copies of 3 receipts/invoices	<input type="checkbox"/>
8. Contract renewal/addendum/amendment(s) to contract, if applicable	<input type="checkbox"/>
9. Documentation to support noncompetitive procurement, if applicable a. Written reasoning for not conducting competitive solicitation b. Noncompetitive Proposal Authorization	<input type="checkbox"/>

Checklist Documentation Due Dates

All documentation requested is either current (Procurement Procedures and Code of Conduct) or from the previous school year (July 1 – June 30) and therefore readily available to provide to the reviewer.

Please submit documentation to the Reviewer by the communicated deadline. Failure to provide documentation required to conduct the procurement review will lead to withheld reimbursements until documentation is received.

Phase 1

GENERAL REQUIREMENTS (CURRENT):

- Child Nutrition Programs Written Procurement Procedures
- Child Nutrition Programs Written Code of Conduct

EXPENDITURE DETAILS (PREVIOUS SCHOOL YEAR):

- Vendors Paid List/Summary of Expenditures
- Completed SFA Procurement Tool
- Completed Food Service Management Company (FSMC) Procurement Packet (if applicable)

Phase 1 Documentation

RECOMMENDATIONS ON HOW & WHAT TO PROVIDE

Checklist Item	Recommendation
1	Provide a system-generated report (summary of expenditures) that lists all transactions out of the nonprofit school food service account from July 1 – June 30 of the previous school year.
2	Utilize the Vendors Paid List (Item 1) while completing the SFA Procurement Tool in Excel. All vendors paid during the previous school year should be included in the appropriate section of the tool. If you are unsure about any specific field or section, reach out to the Reviewer for assistance rather than leaving it blank.
3	Written Procurement Procedures can be ones developed by your organization or adopted using ADE's Procurement Procedures template.
4	Written Code of Conduct can be ones developed by your organization or adopted using ADE's Code of Conduct template.
5	If contracted with a Food Service Management Company, complete the provided packet based on information from the previous school year. This may not be completed by an employee of the FSMC and must be completed by an individual within the SFA.

Phase 2

PROCUREMENT DOCUMENTATION FOR SELECTED VENDORS (PREVIOUS SCHOOL YEAR):

- Copies of invoices/receipts for selected vendors
- Pre-solicitation price/cost analysis
- Solicitation documentation
- Responses to solicitations (quotes)
- Evaluation documentation
- Copy of Contract
- Contract performance management (descriptions of oversight)
- Buy American Provision compliance (description of processes)

Remember: The Phase 2 Documentation checklist will be sent to the SFA after Phase 1 documentation is provided and the Reviewer has selected a sample of vendors to include in Phase 2 of the review.

Phase 2 Documentation

RECOMMENDATIONS ON HOW & WHAT TO PROVIDE

Checklist Item	Recommendation
Simplified & Formal	Describe what internal processes are in place to ensure the awarded vendors provide the products/services in accordance to the contract (e.g., how does the SFA ensure the products/services are satisfactory prior to payment?).
Formal	If a cooperative or third-party is used for procurement of a vendor, it is the SFA's responsibility to provide all required Phase 2 procurement documents to the reviewer. The SFA cannot simply state a cooperative or third-party was utilized. The SFA should already have on hand all procurement documents from the cooperative or third-party documenting the full procurement history of the vendor.
FSMC	Requested invoice detail must include the detailed supporting calculation for the amount of the USDA Foods, DOD and/or NOI credits/discounts reflected on each sampled invoice.

Best Practices:

- A full procurement history of each vendor should be well-documented, organized, named accurately, and stored electronically at all times.
- Clearly label files before providing them to the Reviewer to indicate which of the Phase 2 items each file supports. For example, label the file supporting cost/price analysis as "Vendor Name – Cost/Price Analysis".

Compile and Send Review Documents

SFAs are required to email both the SFA Procurement Tool (in Excel format) and the Phase 1 documents listed on the checklist by the communicated Phase 1 due date.

The Myers and Stauffer Reviewer will acknowledge receipt of the documents and will contact the SFA if the responses and/or documents are inadequate.

At this time, the Myers and Stauffer Reviewer will determine which vendors will be selected for further review and issue the Phase 2 Documentation checklist. Again, SFAs are required to provide this documentation by the communicated Phase 2 due date.

The Myers and Stauffer Reviewer will not disclose any findings until the Exit Conference.

Exit Conference

The exit conference will occur once the Myers and Stauffer Reviewer has collected and reviewed all documentation necessary to complete the procurement review. The Exit Conference will be conducted remotely and will include observations, technical assistance, and next steps.

At a minimum, the Food Service Director is required to participate in the exit conference, but it is encouraged to include an administrator and any individuals who are directly involved with the procurement within the School Nutrition Programs.

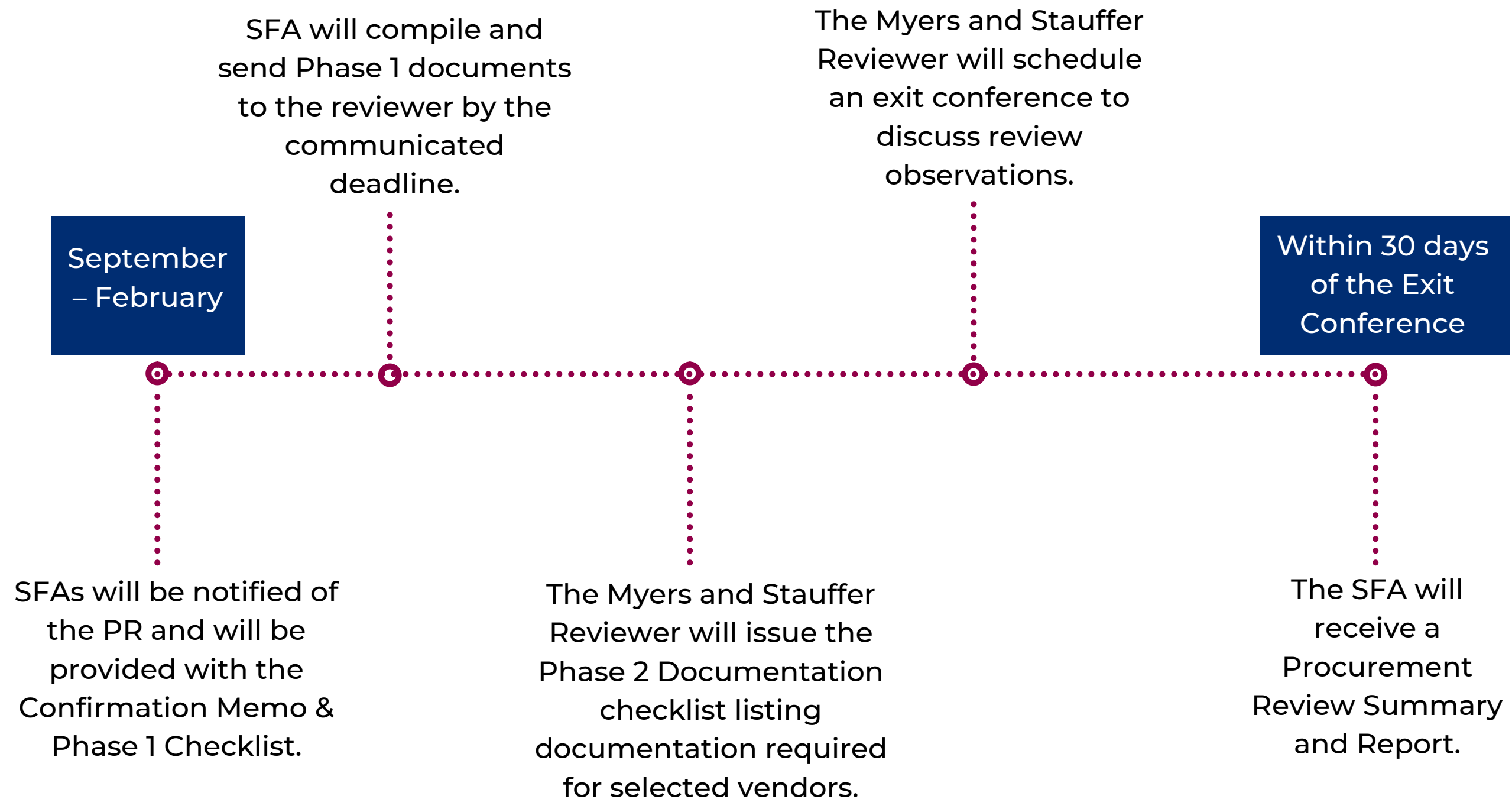


Procurement Review Summary & Report

The Procurement Review Report is a detailed record of any review findings and technical assistance that occurred during the PR. The Summary is the Cover Memo to the Procurement Review Report.

Within 30 days of the exit conference, the Myers and Stauffer Reviewer will send the Procurement Review Summary and Report to the Superintendent Contact and SFA Contact via email.

Procurement Review Timeline



Section Three: Responding to Procurement Review Findings



Procurement Review Summary Report Response

The SFA must review the Procurement Review Summary and Report and is responsible for ensuring all corrective action is submitted to the Myers and Stauffer Reviewer by the given deadline.

Should these post-review actions not be completed by the deadline, reimbursements will be placed on hold until the actions are complete.



Corrective Action

When a reviewer establishes a PR finding, corrective action will be required by the Myers and Stauffer Reviewer to demonstrate the SFA understands the error and has corrected it since being reviewed.

Corrective action may include:

- written descriptions of changes made within the operation after the PR occurred;
- documentation to demonstrate understanding of program regulations; and/or
- certificates showing training was completed.

REQUIREMENTS & DEADLINES

A written response must be provided by the deadline indicated in the PR Report. The response must:

- be on school letterhead,
- be signed by an authorized representative listed on the Food Program Permanent Service Agreement (FPPSA), and
- address all required corrective action items listed in the report.

It is best practice to submit corrective action *prior to* the deadline in case any revisions are required.

- The SFA will receive a **Close-Out Memo** when sufficient corrective action is submitted.

Quiz Time

Is the procurement review closed the day of the exit conference?

- A** Yes, you will never discuss the procurement review again.
- B** Yes, the Myers and Stauffer Reviewer will provide the Close-Out Memo once all findings are discussed.
- C** No, the review is not considered closed until adequate responses for all corrective actions are received and the Close-Out Memo is issued by the Myers and Stauffer Reviewer.



Quiz Time

Is the procurement review closed the day of the on-site visit?

- A** Yes, you will never discuss the procurement review again.
- B** Yes, the Myers and Stauffer Reviewer will provide the Close-Out Memo once all findings are discussed.
- C** No, the review is not considered closed until adequate responses for all corrective actions are received and the Close-Out Memo is issued by the Myers and Stauffer Reviewer.

A written summary of the review findings, technical assistance provided during the review, and the required corrective action will be sent via email once the review is complete. The review is not considered “closed” until the Close-Out Memo is issued.





Congratulations

You have completed the Online Course:
**What to Expect: National School Lunch Program
Procurement Review**

**To request a certificate, please go to the next
slide.**

**Training Title: What to Expect: National School
Lunch Program Procurement Review
Length: 30 minutes**

Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.

Certificate

Requesting a training certificate:

Please click the button to complete a brief survey about this online training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey.

[Take Survey](#)



The information below is for your reference when completing the survey:

- **Training Title: What to Expect: National School Lunch Program Procurement Review**
- **Length: 30 minutes**

Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.





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1. **Mail:** U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Mail Stop 9410, Washington, D.C. 20250-9410;
2. **Fax:** (202) 690-7442; or
3. **Email:** program.intake@usda.gov.

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