



# Brownsville Independent School District

## **BACKGROUND: (continued)**

The consultant will assist the district with conducting a comprehensive review of the Food and Nutrition Program, including financial operations, expenditures, revenue collections, staffing allocations, procurement practices, claiming processes, and overall program sustainability. Additionally, the consultant will support the district in identifying operational and financial inefficiencies, recommending corrective actions, reviewing compliance with state and federal requirements, and assisting Administration with the development of both short-term and long-term financial recovery strategies.

The consultant's expertise and independent evaluation will provide the district with valuable guidance necessary to strengthen internal controls, improve fiscal accountability, and position the program for long-term operational and financial stability. The projected review period is ten (10) weeks, followed by monthly monitoring and support for one fiscal year after completion of the review. All services are included in the proposed fee.



AN EARLY COLLEGE DISTRICT

# BROWNSVILLE

INDEPENDENT SCHOOL DISTRICT

May 27, 2026

Ms. Carmen Ocañas-Lerma, M.Ed., SNS  
3112 Tulip Ave.  
Mission Texas 78504

Subject: Request for Best and Final Offer – Food and Nutrition Services Financial Consulting Services

Dear Ms. Ocañas-Lerma:

Thank you for submitting your proposal to provide Food and Nutrition Services (FNS) Financial Consulting Services to Brownsville Independent School District.

The district has reviewed your proposal and appreciates your extensive experience and expertise in the administration and financial management of school nutrition programs. Your background, including your service as Region I Food and Nutrition Services Administrator, provides valuable qualifications that will assist the district in conducting a comprehensive review of its FNS operations and financial position.

As part of the district's due diligence and procurement process, we are requesting that you submit your Best and Final Offer (BAFO) for the proposed consulting services. We understand that your original proposal amount is \$28,500. In consideration of the district's current budget constraints and ongoing efforts to maximize available resources, we respectfully request that you review your pricing and provide your most competitive final offer.

Please submit your Best and Final Offer no later than Thursday, May 28, 2026 by end of day, to allow sufficient time for review prior to consideration by the Board of Trustees at its upcoming June 2026 meeting.

The district values your interest in assisting Brownsville ISD and appreciates your consideration of this request. Should you have any questions or require additional information, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink that reads "Rosario Peña".

Rosario Peña  
Chief Financial Officer  
Brownsville Independent School District

## Rosario Pena

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**From:** Carmen Ocanas-Lerma, SNS <carmen@lmsassociates.com>  
**Sent:** Thursday, May 28, 2026 3:23 PM  
**To:** Rosario Pena  
**Cc:** Rebekah K. Lara  
**Subject:** Re: Financial Consulting Services - BAFO  
**Attachments:** Child Nutrition Financial Assessment Consulting Proposal 051552026.docx; Child Nutrition Financial Assessment Consulting Proposal 05282026.docx

**CAUTION:** This email originated from outside of Brownsville ISD. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good Afternoon Ms. Pena,

Let this email serve as confirmation of best and final request.

Attached is original proposal in the amount of \$28,500 as submitted in May 15, 2026. Then the new best and final proposal in the amount of \$24,500.

Let me know how I can be of service,

I remain

Carmen Ocanas-Lerma, M.Ed., SNS  
LMS Associates  
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[Carmen@lmsassociates.com](mailto:Carmen@lmsassociates.com)  
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Please send PO's to [orders@lmsassociates.com](mailto:orders@lmsassociates.com).

For quote requests email [quotes@lmsassociates.com](mailto:quotes@lmsassociates.com)

To schedule your demo or request a test kitchen visit Go to: [www.lmsassociates.com](http://www.lmsassociates.com)



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**From:** Rosario Pena <rpena@bisd.us>  
**Sent:** Thursday, May 28, 2026 12:05 PM  
**To:** Carmen Ocanas-Lerma, SNS <carmen@lmsassociates.com>

# Proposal for Child Nutrition Financial Consulting Services

## Prepared For

Brownsville ISD Child Nutrition

## Prepared By

Carmen Ocanas-Lerma, MEd, SNS

## Date

May 28, 2026

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## Executive Summary

This proposal outlines consulting services designed to strengthen the financial performance, operational efficiency, and fiscal accountability of the Child Nutrition Program. The consulting engagement will focus on detailed financial analysis and operational benchmarking to identify opportunities for cost control, labor optimization, improved forecasting accuracy, and sustainable program profitability.

The review will include:

- Profit and loss analysis
- Meals per labor hour (MPLH) evaluation
- Identification of over-estimated and under-estimated budget accounts
- Per plate cost analysis by month for the fiscal year
- Financial trend analysis and operational recommendations
- Executive reporting and strategic guidance

The goal of this engagement is to provide leadership with actionable financial insights that support informed decision-making, operational efficiency, compliance, and long-term fiscal sustainability.

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# Scope of Services

## 1. Profit and Loss Analysis

A comprehensive review of revenue and expenditures related to the Child Nutrition Program will be conducted to assess overall financial performance.

### Services Include

- Review of monthly and annual financial statements
- Analysis of revenue streams including:
  - Federal reimbursement
  - State reimbursement
  - Local revenue
  - A la carte sales
  - Catering and other program income
- Analysis of expenditure categories including:
  - Food costs
  - Labor costs
  - Supplies
  - Equipment
  - Indirect costs
- Identification of cost trends and variances
- Comparison of actual expenditures to budgeted amounts
- Recommendations for improving financial performance and cost recovery

### Deliverables

- Profit and loss summary report
  - Variance analysis report
  - Financial trend dashboard
  - Recommendations for fiscal improvement
- 

## 2. Meals Per Labor Hour (MPLH) Analysis

A labor productivity analysis will be completed to evaluate staffing efficiency across school sites and/or production facilities.

### Services Include

- Calculation of meals per labor hour by site and district-wide
- Review of labor scheduling practices
- Benchmarking against industry standards and comparable districts

- Identification of overstaffed or understaffed operations
- Evaluation of productivity trends by month and location
- Recommendations for labor optimization

#### Deliverables

- MPLH calculation report
  - Site productivity comparison summary
  - Labor efficiency recommendations
  - Staffing optimization strategies
- 

### 3. Budget Account Analysis

A detailed review of budget accounts will be conducted to identify accounts that are consistently over-estimated or under-estimated.

#### Services Include

- Review of current and prior fiscal year budgets
- Comparison of budgeted versus actual expenditures
- Identification of recurring variances
- Trend analysis by account category
- Evaluation of forecasting methodologies
- Recommendations for improving budget accuracy

#### Deliverables

- Budget variance analysis report
  - Over-estimated account summary
  - Under-estimated account summary
  - Budget forecasting improvement recommendations
- 

### 4. Per Plate Cost Analysis by Fiscal Year Month

An in-depth cost-per-plate analysis will be completed to determine the actual cost of producing meals throughout the fiscal year.

#### Services Include

- Monthly calculation of meal production costs
- Analysis of:
  - Food cost per plate
  - Labor cost per plate

- Supply cost per plate
- Total operational cost per plate
- Review of participation trends impacting plate cost
- Seasonal and operational trend analysis
- Identification of cost fluctuation drivers
- Recommendations for cost containment strategies

## Deliverables

- Monthly per plate cost report
  - Fiscal year trend analysis
  - Cost driver analysis
  - Recommendations for operational efficiencies
- 

## Methodology

The consulting engagement will utilize a collaborative and data-driven approach.

## Data Collection

The following information may be requested:

- General ledger reports
- Trial balances
- Budget reports
- Financial statements
- Payroll and labor reports
- Meal count and participation data
- Production records
- Inventory reports
- Staffing schedules
- Prior audit findings (if applicable)

## Analysis Process

1. Initial consultation and needs assessment
  2. Data collection and validation
  3. Financial and operational analysis
  4. Benchmarking and trend evaluation
  5. Development of findings and recommendations
  6. Presentation of results and action plan
-

## Project Timeline

Phase	Estimated Timeline
Initial Consultation	Week 1 (2 days)
Data Collection	Weeks 1–3 (6 days)
Financial Analysis	Weeks 3–4 (4 days)
Operational Review	Weeks 4–6 (4 days)
Draft Reporting	Week 7-9 (4 days)
Final Presentation & Recommendations	Week 10 (2 days)

Timeline may be adjusted based on data availability and scope modifications.

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## Consulting Fees

Fee to complete Project in the 10 week timeline listed above plus monthly monitoring for 12 months or 1 FY.

Service	Fee
Full Financial & Operational Review	\$24,500

Additional services outside the agreed scope may be billed separately upon client approval.  
Daily rate is \$850

Invoiced on a monthly basis.

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## Client Responsibilities

The client will provide timely access to requested financial and operational records necessary to complete the analysis. The client will also designate a primary point of contact to facilitate communication and coordination throughout the engagement.

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## Confidentiality

All financial, operational, and personnel information shared during this engagement will remain confidential and will only be used for the purposes of the consulting services outlined in this proposal.

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## Expected Outcomes

Upon completion of this engagement, the Child Nutrition Program can expect:

- Improved visibility into financial performance
  - Enhanced budget forecasting accuracy
  - Better understanding of labor productivity
  - Identification of operational inefficiencies
  - Actionable recommendations for cost containment
  - Improved fiscal sustainability and program management
- 

## Acceptance

By signing below, both parties acknowledge acceptance of the scope and terms outlined in this proposal.

Client Representative

Consultant Representative

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

# Carmen Ocañas-Lerma, M. Ed., SNS

3112 Tulip Ave.  
(956) 648-2311 (C)  
Mission, Texas 78504  
[Carmenocanas@gmail.com](mailto:Carmenocanas@gmail.com)

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## CAREER OBJECTIVE

Results driven, solution-oriented professional with strong desire to continue my work in a professional capacity utilizing my skills, experience, knowledge, and education and to continue my development in a leadership capacity.

## EXPERIENCE

### LMS ASSOCIATES

02/24 - Present

#### *Equipment Specialist*

- Responsible for the promotion of commercial kitchen equipment to customers in the k-12 segment.
- Identify and develop new business opportunities, maintaining and growing existing relationships with clients, providing products, cooking demonstrations and training, and providing ongoing support and service.
- Work closely with customers to understand their needs and provide solutions that meet those needs from menu development to production (satellite kitchen, central kitchen or commissaries and on-site cooking kitchens).
- Negotiation of contracts, specification writing, reviewing technical requirement of bid proposals or request for proposals.
- Work with marketing, engineering, and production to ensure customer needs are met.

### REGION ONE EDUCATION SERVICE CENTER

08/13 – 01/24

#### *Administrator Food & Nutrition Programs*

- Administer Region One objectives by planning long- and short-term goals and strategies in meeting the TDA/USDA regulations for the federal nutrition program implementation in schools and other providers, to include reviewing recommendations, developing, or revising training, interpreting administrative rule, policy or laws pertaining to all federal nutrition programs to ensure all districts across the Region One are efficient and successful in the operation of the nutrition program.
- Develops and monitors the Office of Nutrition Programs budget according to TDA/USDA guidelines; prepares periodic statistical and narrative reports on all programs; and provides support to program operators' application and reimbursement process which is one-fourth of a billion dollars to the Region One Area.

- Provide Technical Assistance and Training to all contracting entities participating in the following nutrition programs, NSLP, SBP, CACFP at Risk, FFVP, SFSP, SSO, USDA Commodities.
- Assisted over two hundred Child and Adult Care Food Program contracting entities through the application process as well as technical assistance during their administrative review/federal audit.
- Provided technical assistance and training 46 National School Lunch Program (NSLP) districts through the application process as well as their administrative review, procurement review and financial review.

**MCALLEN INDEPENDENT SCHOOL DISTRICT**

10/98 – 08/13

*Director Food & Nutrition Services*

- Administer and coordinate the effective and efficient operation of the Food & Nutrition Program.
- Monitor Compliance of both federal and state guidelines and regulations. Received Excellent Score on the last 3 Coordinated Review Effort Federal Audits/Administrative reviews.
- Increased Breakfast in the Classroom Program by 68%
- Increased Breakfast Participation from 14% to 85%
- Increased Lunch Participation from 54% to 84%
- Increased annual budget from \$4 million in 1998 to \$13 million in 2013.
- Increased A la Carte Sales from \$500,000 annual sales to \$1.3 Million Annual sales
- Managed the transition of the Food & Nutrition Department to a new, state of the art facility, to include innovative technologies, point of sale, inventory management, wireless temperature monitoring, and centralized food distribution and transportation planning and logistics.
- Assisted with the passing of a Construction Bond District wide in the amount of 98 million dollars.
- Consulted with Architect, engineer and developer on the construction of the new facility under the bond with a direct approach in the design, development, and construction phase.
- Established the Food & Nutrition Marketing Program & Website
- Manage and oversee a total of 232 staff members.

**MISSION CONSOLIDATED INDEPENDENT SCHOOL DISTRICT**

10/90 – 10/98

*Assistant Director for Food Service Department*

- Organized and directed all departmental areas through direct supervision of cafeteria managers and staff
- Applied all standards of safety and sanitation.
- Served on safety committee to prevent accidents in the workplace and reduced workman comp claims by over 50%
- Hired, and trained all staff.
- Translated all workshop material for staff.

- Directed purchasing functions, formal bid process for multimillion dollar contracts, obtaining quotes when appropriate.
- Supervised the centralized production areas.
- Prepared and reported to management all monthly financials, MPLH reports, inspection, and monitoring reports.
- Assisted Director in Menu Planning and recipe development and entered all menus in nutrition analysis software
- Maintained and coordinated all departmental documentation, record retention, and financial statements.

## **EDUCATION**

**THE UNIVERSITY OF TEXAS PAN AMERICAN**  
*Bachelor of Business Administration in Management*

**Lamar University**  
*Master of Education Global Distance Learning and Leading*

**School Nutrition Association Credential**  
*School Nutrition Specialist (SNS) Credential*  
*1 of 200 in the state of Texas to hold this certificate*

## **SKILLS & ABILITIES**

- Ability to communicate proficiently in English and Spanish
- Ability to translate verbally or written in both English and Spanish
- Strong Knowledge of Office Tools, Excel, One Note, Outlook, PowerPoint, Publisher, Word, Canva, Canvas, Zoom, Teams, Adobe Connect, Padlet, Nearpod, Go Learn
- Strong Knowledge of Food Service Software, System Design Point of Sale, Nutritkids, Horizon Point of Sale, Menu Planner, Nutrition Analysis, and TempAlert Software

## **ORGANIZATIONS**

- Valley Association of School Nutrition Professionals member
- Texas Association for School Nutrition member
- American Association for School Nutrition member
- UTRGV Equitable Food Systems Advisory member
- Past Board Member of the Texas Association of School Nutrition (TASN)
- Past Member of the National Association of Purchasing Managers (NAPM)
- Past Member of the Texas Association of School Business Officials (TASBO)