APPENDIX F01.01. SFPS QUARTERY PROGRAM DATA FORM AND FOOD PURCHASE DATA REQUEST EMAIL (GROUPS 1A AND 1B) AND APPENDIX F01.02 SFPS FOOD PURCHASE DATA CHECKLIST (GROUPS 1A AND 1B)

Subject: USDA National School Foods Study: Please Submit Food Purchase Data for the [1st/2nd/3rd/4th] Quarter

Dear [SFA Director]:

Now that the [1st/2nd/3rd/4th] quarter of the school year, [Month1 – Month 3], is almost completed, we are asking that you prepare to 1) submit quarterly food purchase data, and 2) complete the quarterly program data form on quarterly revenues and expenditures, for USDA's National School Foods Study.

If food purchase records will be obtained from someone else in your district, and you have not already informed us, please forward this email to them and copy us (email) so that we can communicate with them directly.

1. Submit Quarterly Food Purchase Data

For all foods acquired during the [1st/2nd/3rd/4th] quarter of School Year 2024-2025, from [month1 to month 3], please provide the following information contained in velocity reports, vendor summaries, and other related documents:

- **Product Name (e.g., beef burger, canned tomatoes, pizza)**
- **Product code**
- **Brand name, if a branded product**
- **Manufacturer code**
- **Distributor code**
- **Pack size (case size, pounds, bushels, etc.)**
- **Total units sold**
- **USDA Foods Value Pass Through Method (for processed end products containing USDA Foods as ingredients, typically available through velocity reports, USDA commodity unprocessed usage reports, or similar from your distributor)**
- **Identify unprocessed foods grown within your State**
- **Total cost**

Note that the data should include only foods that were delivered to your district during the specified timeframe, including products purchased commercially and processed end products containing USDA Foods, and foods used in reimbursable meals and nonprogram foods (a la carte).

Please identify any unprocessed foods that were grown or produced within your State, by adding a note next to the item, or adding a new column. If all items from a vendor were grown or produced within your State, you may indicate that at the top of the invoice or receipt.

Do not include food orders placed but not actually received, or foods used for adult meals, catering, or programs other than the National School Lunch or School Breakfast Programs (e.g., Child and Adult Care Food Program). You also do not need to provide data on direct delivered USDA Foods (formerly known as brown box foods) or USDA DoD Fresh foods received during the quarter. We will obtain that data directly from USDA and State Distributing Agencies.

The attached food purchase data submission checklist has detailed instructions and descriptions of each of the requested data elements. Please use this checklist to ensure you provide all food purchase data for the quarter. We strongly encourage you to provide an Excel file or other electronic editable format if at all possible.

How to Submit the Data

Please upload the file(s) to the study website at [study file transfer site] by entering the unique PIN assigned to you.

   Unique PIN assigned to you: [####]

There are instructions on the website on how to upload your data.

If you are unable to upload the files, you may email them to me [insert specific instructions for labeling the email and possibly encrypting it].

2. Complete Quarterly Program Data Form

Please complete the quarterly program data request for the [1st/2nd/3rd/4th] quarter by clicking here [direct link to form]. The specific information that will be requested is as follows:

- Number of serving days and meals served and claimed by type (free, reduced price, paid)
- Total revenue from the sale of nonprogram foods and beverages (i.e., a la carte, competitive foods)
- Top 10 selling nonprogram foods
- Other food program sales (if applicable)
- Total food expenditures for food and beverages

We have attached a PDF copy of the survey, so you can review the questions and collect the necessary information to answer the questions prior to logging in.

Timeline for Data Submission and Form Completion

We ask that you submit the food purchase data and complete the quarterly program data request as soon as possible but no later than [date one month from end of quarter].

After Data Submission

Following data submission, the study team will review all the data you submit and ask you to provide any needed clarification.

For Assistance or Questions

- The study website at [study website] is the hub for study activities and resources. You may wish to view the recording of the recent webinar on Food Purchase Data if you have questions about the needed data, or look at the Frequently Asked Questions.

- For individual assistance, you may email me at [email] or call me at [XXX-XXX-XXXX].

We appreciate your support of the study and look forward to receiving your data soon. As a reminder, SFAs that complete all data requests for the study will receive [If Group 1a: $350; If Group 1b: $335; If Certainty SFA: $590].

Sincerely,

[Name]

Attachments:
- Food Purchase Data Submission Checklist
- PDF of Quarterly Program Data Request

Note for reviewers: The burden associated with this document is included in the burden disclosure statement on Appendix F01.01: SFPS Quarterly Program Data Form and Food Purchase Data Request Email.

2024–2025 National School Foods Study
FOOD PURCHASE DATA SUBMISSION CHECKLIST

Use this checklist to ensure you provide all food purchase data for the quarter.

FOOD PURCHASE INCLUSIONS AND EXCLUSIONS	
Food purchase: <u>food received</u> by the SFA or the school in the specified quarter	
1. **Include:**	
• All food purchases for **National School Lunch Program (NSLP) and the School Breakfast Program (SBP)**	☐
• Food purchases for **a la carte (nonprogram foods)**	☐
• **ALL food deliveries** in the specified quarter regardless of when the order was placed	☐
• Food deliveries from **FSMCs, distributors, and commercial vendors**	☐
• **Processed end products containing USDA Foods as ingredient.** Please flag these food items. This information is typically available through velocity reports, USDA commodity unprocessed usage reports, or similar from your distributor.	☐
2. **Exclude:**	
• USDA **DoD Fresh** deliveries (these will be provided by USDA)	☐
• **USDA Foods direct deliveries** (formerly known as brown box. These will be provided by your State agency.)	☐
3. **Exclude or flag:**	
• Food purchases for **other programs or school districts** (e.g., CACFP, adult meals, catering)	☐
• Food orders **placed but not delivered** in the specified quarter	☐
SFA LEVEL REPORT FOR THE QUARTER	
4. Submit information on food purchases from **ALL schools in the district.**	☐
5. Submit information on food purchases at the **SFA level** – i.e., purchases from any given source (e.g., FSMC, USDA direct deliveries/brown box, commercial suppliers, food buying cooperatives) are aggregated across all schools. Submit school level delivery data if this is not feasible.	☐
6. Submit information on food purchases at the **quarter level** – i.e., weekly or monthly purchases are rolled up at the quarter level. Submit weekly or monthly purchase data if this is not feasible	☐
PRODUCT SPECIFICATIONS	
7. **Product name/description** (e.g., canned tomato, pizza, hamburger patty, etc.)	☐
8. **Product codes** (vendor and manufacturer assigned codes that describe the product)	☐
9. **Quantity purchased**: unit size (e.g., pack size, case size) and number of units purchased (e.g., 6 10-lb. bags of carrots; 3 cases of 5-lb. each potato tater tots; 400 units of ½ pint 1% milk, etc.)	☐
10. **Identify unprocessed foods grown within your State** (Make a note next to the food item or add a column to indicate foods grown or produced within your State. If all foods from a vendor were produced or grown within your State, make a note at the top of the invoice or receipt.)	☐
11. **USDA Foods codes and value pass through methods** (e.g., indirect discount or net off invoice, rebate or refund, fee for service) must be included for processed end products containing USDA Foods as ingredients.	☐
12. Total **cost** ($) AND/OR unit cost ($) per item	☐
FORMAT	
13. Submit food purchase data in **EXCEL or other editable format if available**. Submit PDF files (e.g., invoices, etc.) if Excel files are not available. You may submit the data in the format in which it is available to you. You do not need to reorganize or reformat the data.	☐

Thank you for your participation in the National School Foods Study.