DOCUMENT GATHERING CHECKLIST FOR COST ANALYSIS FARM TO SCHOOL ITEMS

Use this checklist as a guide for the documents/data you will need to complete this cost analysis tool for calculating the comparison of **Farm to School** items and commercially equivalent purchased products. Having everything on hand before you begin spreadsheet entries will assure you have all data required to conduct an accurate analysis.

DIRECT DELIVERED USDA FOODS INFORMATION

☐ The following information for each of the products populated in the worksheet:
- Total servings per case
- USDA foods case value
  - Found in TX-UNPS "Farm to School Survey"

☐ Warehouse storage and delivery fees charged for these products (access current fees at link below)
- https://squaremeals.org/Programs/FoodDistributionProgramforCNPrograms/TDAContractedWarehouses.aspx

COMMERCIAL PRODUCT INFORMATION

☐ Commercial equivalent product descriptions

☐ Total servings "per case" for commercial equivalent products

☐ Bid pricing for commercial equivalent products
- This pricing should include all distribution fees currently assessed for the products
- Past delivery invoices are the best source for this information
- Bid quotes are another source for this information

☐ The estimated number of servings needed for the cost comparison.
- Users can enter comparisons for singular purchases or input servings needed on an annual basis.

BEST PRACTICES

☐ Gathering data needed before beginning work in spreadsheet decreases the need to access multiple data points while doing entry work

☐ Set aside enough time to complete your data entry without interruptions

☐ Reference usage reports to determine accurate case counts needed for service of each individual item

☐ Assure pricing used is accurate and up to date

☐ Calculate any delivery and service fees before beginning data entry

☐ Compare products that have the same menu uses and component contributions

☐ Be aware of which columns require data entry

☐ Review entries for accuracy

☐ Utilize the "instructions" tabs of the worksheet to cross check data needed