

Joplin Schools



REQUEST FOR PROPOSAL NUTRITION SERVICES SOFTWARE SYSTEM

**School Cafeteria Point of Sale,
School Cafeteria Management System,
Vending Management System,
Central Office Management System
and Central Warehouse System**

October 7, 2016

Request For Proposal

Nutrition Services Software System

General Information

The Joplin School District (District) will accept proposals for Nutrition Services Software System as described in the attached request. A copy of Joplin Schools' bid policy is attached and made a part of this RFP.

Estimated Timetable:

Release of RFP	October 7, 2016
Deadline for submittal of RFP	November 4, 2016 @ 12:00 pm CST
On-Site Demos (Top three)	November 7 – December 1, 2016
Recommendation to Board of Education	December 20, 2016
Notice to Proceed	January 2, 2017
Go Live (All sites using new software program)	August 7, 2017

Submittal Instruction

1. Proposal must be received by email by **November 4, 2016 @ 12:00 pm CST.**
2. Email bids in .pdf format should be sent to sealedbid@joplinschools.org by the date and time specified. Be sure that the subject line reads **Nutrition Services Software System** and the size of your submission does not exceed a total of 10 MB. When you send the bid to the district's secure mailbox, you should receive a complimentary "Thank You" auto reply message. If you do not receive this message please contact G.G. Mathis at 417-625-5200 ext. 2008 immediately.

The District is not responsible for lateness or non-delivery by the U.S. Postal Service or by email to the District. The time and date recorded by the District shall be the official time of receipt. Late bids will not be considered. Joplin Schools is not responsible for non-delivery or non-receipt of electronic bids.

Questions may be directed to Rick Kenkel
Phone: 417-625-5315
Email rickkenkel@joplinschools.org

General District Information
www.joplinschools.org

REQUEST FOR PROPOSAL NUTRITION SERVICES SOFTWARE SYSTEM

Certification Form

Joplin School District (District) will accept proposals for Nutrition Services Software System, as described in the attached request. Qualified organizations (Respondent) are invited to submit a proposal as described herein.

Service Requested

Proposals are sought for a complete implementation solution including software, data conversion, installation, training, and ongoing technical support and maintenance which is hosted by the provider (Respondent). The following services will be required for providers of the Nutrition Services Software System. **Bids will be based on a ten (10) year period including the first year startup (software, data conversion, installation and training, travel and per diem) and the annual renewal fee (support and maintenance). Year one (1) starting January 1, 2017 through June 30, 2018 and the following nine (9) year annual renewal starting July 2018 through June 2027.**

- | | |
|---------------------------------------|---|
| 1. Point-of-Service Software (POS) | 2. Free and Reduced Meal Application Processing |
| 3. Online Free and Reduced Processing | 4. Menu Planning / Nutritional Analysis |
| 5. Production | 6. Inventory |
| 7. Ordering | 8. Financial Analysis |
| 9. Central Warehouse | 10. Online Meal Payment System |
| 11. Vending – Reimbursable Meals | 12. Bid Analysis |
| 13. Web Based Hosted Solutions | |

The undersigned certifies that he/she has authority to bind this company in an agreement to supply the services or commodity in accordance with all terms and conditions specified herein. Please type or print the information below.

Respondent is required to complete, sign and return this information with the proposal.

Company Name

Authorized Person (Print)

Address

Signature

City/State/Zip

Title

Telephone #

Date

Tax ID#

Fax

Entity Type

E-mail

Policy Descriptor Code: DJF-1

Purchasing

The Board recognizes the importance of a sound fiscal management program and expects district staff to maximize the resources available for the district's educational program and to be good stewards of public funds by exercising fair, competitive purchasing practices. The district will respect its financial obligations and will also require that providers meet their obligations to provide quality products and services in a timely manner to the district.

All funds deposited with the district, regardless of source, are considered district funds and are subject to this policy. No contract will be entered into or bill paid without the proper documentation and without an affirmative vote from a majority of the whole Board. Purchases that may exceed \$15,000 must have prior Board approval unless this policy's emergency provisions are applicable.

The Board encourages district staff to purchase products manufactured, assembled or produced in the United States.

Purchasing Supervision

The chief financial officer will serve as the district's purchasing officer or will designate a purchasing officer. The purchasing officer will supervise district purchases of products and services and may authorize purchases on behalf of the district that comply with the Board-adopted budget and this policy. The superintendent, in consultation with the purchasing officer, shall develop procedures to implement this policy in a manner that will meet the district's needs while protecting the district's resources. These procedures will comply with all applicable laws and will centralize and provide oversight of all purchasing decisions.

Competitive Purchasing

District staff will research all purchases and compare prices prior to making decisions regarding the expenditure of district funds, unless a purchase is covered by an exception pursuant to this policy. Employees are expected to contact multiple providers before making a decision regarding purchases under \$1,500. Purchases ranging from \$1,501 to \$4,500 shall be made on the basis of oral quotes from reputable suppliers. Purchases ranging from \$4,501 to \$15,000 shall be made on the basis of at least three written quotes. Purchases over \$15,000 will be bid in accordance with procedure and submitted for Board action.

The district will select the lowest or best bid. The district reserves the right to waive minor technical defects in a bid, reject any and all bids, reject any part of a bid, advertise for new bids, or make the purchase on the open market if the product or service can be obtained at a better price.

Unless bids are for a one-time, specific purchase, bids will apply to purchases for up to the next 12-month period. Bid threshold amounts should reflect the known or estimated costs anticipated over the 12-month period. Bid periods that are over or under 12 months require approval by the superintendent or purchasing officer.

When the purchasing officer determines that the purchase requires competitive negotiations, products or services may be purchased by competitive proposals. Likewise, the superintendent, in consultation with the purchasing officer, is directed to create procedures that allow the district to benefit from cooperative purchasing and address unusual situations such as purchasing when there is a single feasible source for the purchase. The superintendent is also directed to create a process whereby authorized providers are selected for frequent purchases, while still monitoring the competitiveness of these providers. If the purchase is from a single-source provider, bid documentation must include an explanation of why a single-source vendor must be used and must be submitted to the superintendent or purchasing officer for review and approval.

Emergency Situations

Unless otherwise required by law, the superintendent may waive the requirement for competitive bids or proposals when he or she has determined that there exists a threat to life, property, public health or public safety or when immediate expenditure is necessary in order to protect against further loss of or damage to property, or to prevent or minimize a serious disruption in services. Emergency purchases shall be made with as much competition as is practical under the circumstances and will only be utilized for purchases that are necessary to alleviate the emergency.

Confidentiality

Sealed bids and related documents will be kept confidential until bids are opened. District staff will not disclose offers, bids or price quotations to competitors except as necessary to conduct negotiations beneficial to the district or as required by law. All contract negotiations and related documents are considered closed until a contract is executed or all proposals are rejected.

Credit and Purchasing Cards

Any employee or Board member using a district card shall sign a card usage agreement and will receive training on applicable procedures for card use. District employees and Board members issued a card must provide documentation, such as receipts and applicable budget codes, justifying expenditures. The purchasing officer will examine all documentation prior to payment and will notify the superintendent or designee immediately if any purchase was made in violation of law or district policies or procedures.

All employees and Board members issued a district card must take all reasonable measures to protect the cards against damage, loss, theft or misuse. Any damage, loss, theft or misuse of the card must be reported to the superintendent immediately. No person may use the card other than the authorized employee or Board member to whom the card was issued. District employees and Board members will surrender all cards upon completion of their employment or term with the district or upon demand by the district.

Prohibited Activity and Reporting Requirements

The district expects all staff members to comply with the letter and intent of all district policies and procedures regarding purchasing. Under no circumstances may employees use district funds to make unauthorized or personal purchases. Staff members may not artificially divide purchases to avoid bidding requirements or design bid specifications to favor a particular provider.

All district employees must report suspected fraud, theft or misuse of district funds to the superintendent or purchasing officer immediately. District employees may be disciplined or terminated from employment for failing to follow Board policy or district procedures and for any misuse of district resources, including district cards.

The superintendent or purchasing officer will contact law enforcement and file a report or sign a complaint on behalf of the district in situations where a crime may have occurred.

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PART I: INTRODUCTION/OVERVIEW

Purpose/Objective

It is the intent of the Request For Proposal (RFP) to seek qualified vendors for a Nutrition Services Software System. The desire is to have a single vendor for the purchase of software, data conversion, installation, training and ongoing annual technical support and maintenance software solution.

Background

The Joplin School District is located in Joplin, MO. There are approximately 7,800 students attending sixteen academic school facilities. Grade levels range from pre-school through twelfth grade. The District currently has eleven (11) Elementary buildings and four (4) Secondary building and one (1) Early Childhood building, one (1) District Administration building, and five (5) Support Service buildings.

Bid document is based on request for technology at all one (1) Early Childhood site, eleven (11) Elementary sites, four (4) Secondary sites, and the Nutrition Services Office (a Support Services building). This equates to seventeen (17) manager terminals, approximately thirty (30) cashier terminals, four (4) central office terminals in the Nutrition Service Office, and four (4) vending machines.

Scope of the Project

Proposals are sought for a complete implementation solution including software, data conversion, installation, training, and ongoing technical support and maintenance.

Proposal Submission:

The entire proposal must be sent to sealedbid@joplinschools.org clearly marked in the subject line **NUTRITION SERVICES SOFTWARE SYSTEM** or mailed to Rick Kenkel, Director of Nutrition Services at Joplin Schools, P.O. Box 128, Joplin MO. 64802. Proposals received past the deadline will not be considered.

Questions about the RFP should be submitted in writing or emailed to Rick Kenkel.

Email rickkenkel@joplinschools.org at least 3 days prior to bid opening date.

Additional Information

The District reserves the right to request any additional information, which might be deemed necessary after reviewing this document.

Withdrawal of Proposals

Proposals may be withdrawn upon written request received from vendors prior to the stated date and time of the proposal opening. Negligence, error, or oversight confers no right for withdrawal of the proposal after the time fixed for proposal opening.

Non-Discrimination

The District requires that all of its contractors abide by non-discriminatory practices in hiring, recruitment placement, and selection for training, promotion, and compensation.

Contractors and their subcontractors must ensure that applicants and employees are not discriminated against on the basis of race, color, religion, ancestry, national origin, age, handicap or sex.

Guarantees and Warranties

All guarantees and warranties should be stated in writing and submitted as part of the proposal.

The vendor shall warrant that the system will meet the reliability and performance requirements set forth in the RFP and will continue to do so as long as the system remains under vendor maintenance.

Evaluation and Selection Criteria

- | | |
|---|------|
| • Adherence of the proposal to response format | 0-10 |
| • Adherence of the proposal in meeting the technology, functional, and implementation services requirements outlined in the document. | 0-20 |
| • Feedback from references, company's stability and commitment | 0-20 |
| • Company's overall experience | 0-10 |
| • Cost / Fees (based on a ten (10) year period) | 0-40 |

Proposal will be evaluated to determine which proposal best meets the needs of the District. While a significant factor, cost will not be a dominant factor. Cost will be particularly important when all the other evaluation criteria are relatively equal.

Timeline for Process

The timeline listed below is the District's estimation of time required to complete the process. All efforts shall be made to abide by the schedule; however, it is subject to change if necessary.

Request for Proposals Issued	October 7, 2016
Bidder Questions Due to District	October 28, 2016
Response to Questions	November 1, 2016
Proposal Due	November 4, 2016
On-Site Demos (Top three)	November 7 – December 1, 2016
Recommendation to Board	December 20, 2016
Notice to Proceed	January 2, 2017 (Pending BOE Approval)
Go Live Date (All sites using new software program)	August 7, 2017

Communication with selection team member is limited to the Respondent question period that closes October 28, 2016. Communication with Board members and/or other District staff in an effort to influence the outcome of the RFP selection process is prohibited and will result in rejection of the firm's proposal.

Review Process

Following the submittal deadline, the selection committee shall evaluate the proposals. The period of evaluation of the proposals may be extended. Firms will be evaluated according to their response to the Request of Proposal.

Submission of Response

In submitting a proposal, the Respondent agrees to provide the services outlined in the proposal according to the fee structure enumerated in the same proposal. The successful Respondent will provide a Letter of Engagement for District approval which enumerates the terms of the agreement.

The District reserves the right to terminate the relationship with the Respondent at any time and for any reason. During the agreement, the District reserves the right to utilize the services of another firm if the District determines it is in its best interest.

Commencement of services shall be as soon as possible after the District Board of Education approves the proposal with the successful Respondent, and the District files can be transferred, if necessary; target date will be the first of the month following Board of Education approval.

The response shall follow the outline above and be concise. Failure to follow instructions may nullify the response from consideration. To be considered for selection, Respondents should clearly limit responses to the specific criteria in the order listed. No joint responses (proposals) will be accepted by the District.

The deadline for submitting the response shall be in accordance with the notice. Proposals received after this date and time will not be considered. Telephone, facsimile, electronic or electronic modification of proposals will not be considered. The District is not responsible for lateness or non-delivery by the United States Postal Service or other carrier to the District. The time and date recorded by the District shall be the official time of receipt.

Contract Duration

The initial contract will be in effect for ten (10) years with January 1, 2017 through June 30, 2018 being year one (1), and with the option of renewing the contract one year at a time, based upon continuing evaluation, cost analysis and mutual agreements between the school system and the vendor. Updates and patches to software should be included at no additional charge for at least ten (10) years from the date of implementation of the system.

Renewal Provision

The Contract award is ten (10) years in duration with year one (1) starting January 1, 2017 through June 30, 2018 and with an annual one (1) year renewal period with nine (9) additional years in duration (July 2018 – June 2027). The District reserves the right to add/or delete modules during the contract period. Price increases based on uncontrollable events will not be readily accepted. If the pricing requirements cannot be met, the bid will not be approved for renewal.

Software Demonstrations

While the district is open to onsite demonstrations of the product and services of prospective, responsible bidders prior to or during the proposal evaluation period, we reserve the right to schedule such visits at our discretion and convenience. Such a demonstration is not a requirement for consideration or selection of vendor.

Training Requirements

Vendor shall provide both system training and end-users training for the proposed system, on as needed bases. Vendor shall include all Vendor's cost (e.g., travel, per-diem, and training materials expense) to provide such training in the proposed system cost.

The scope of the system training is to include any and all functions for setup, system administration, installation and on-going operation of the Integrated Nutrition Services Software System. System training shall be provided as soon as possible after contract award consistent with Vendor's and the District personnel schedules, as well as facility and personnel scheduling and availability.

Training is to be done by a qualified instructor(s) and shall provide for a predominantly "hands-on" type of instruction. Copies of comprehensive reference materials shall be provided by the Contractor to cover the contents of the training session(s) that will become part of the Districts documentation for the system.

Contractor shall provide, at no additional charge, printed copies and electronic operating manuals, which describe in detail the software capabilities, its operation, installation procedures, error messages with identification of probable causes, software modification procedures and techniques, and program interfaces. Contractor agrees the District may make such additional copies of documentation supplied pursuant to this section as needed for use by District employees. Contractor also agrees that the District may use such documentation to create process-based user manuals for the use by District employees.

PART II: SYSTEM SPECIFICATIONS

Response to Specifications

Vendors must respond to every functional, technical, and general implementation requirement contained in the Specifications section of the RFP using the following criteria. Vendor's responses must be in the same order in which points appear in this RFP.

- Y YES. Feature, functions, product, or service is available as requested and is fully operational using the version at one or more districts.
- N NO. Feature, function, product, or service is not available nor in development.
- D IN DEVELOPMENT. Feature, function, product, or service is under active development and operating in a demonstrable test environment.

For any specifications to which the vendor answers other than YES, vendor must describe:

- a) The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed.
- b) Whether the District will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.

Any such exception taken to any specification must be stated immediately following the specification in question.

The District reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.

GENERAL FEATURES

Requirement:	Response	If not "Y" vendor explanation
Option to purchase software license, lease/purchase, or service agreement		
Option to purchase only the specific modules needed for each site		
Enterprise-wide pricing option		
User friendly, Windows/Web style user interface		
Centralized database with immediate access to critical information		
Vendor hosted database		
Synchronized centralized database to assure redundancy in case of communication failures		
Web-based, thin client components for easy installation and maintenance of non-critical function		
Fully integrated system – POS, Back of House and Vending		
Ability to have hierarchy user accounts (Administrator, Central Office, Manager, and Cashier)		
PCI Security Standard Compliant		
Guaranteed Quality Service for Low Latency		

POS HARDWARE

Requirement:	Response	If not "Y" vendor explanation
Universal keypad acceptance of combo keypad/barcode scanner for entry of PIN, ID or Barcode		
Ability to use non-proprietary ID reader devices (Pin pad, barcode) for student identification		
Ability to use current site manager computer and cashier lines machines – Dell Optiplex 7010 (RAM 8 GB, intel® Core™ i5-3570 CPU 3.40 GHz		
Supports dual sided PIN devices per POS station		
Ability to use current touch screens (FireBox and AquaEra)		
Supports vending machines with universal vending interface support (VendNovation 5.81) – 4 vending machines		
Support meal and ala carte vending sales		

TECHNOLOGY

Requirement:	Response	If not "Y" vendor explanation
Option for District hosted centralized student database		
Built-in interface to accept web free and reduced applications		
Built-in exports to Excel, CSV, Word, Text and PDF		
Automated synchronization features for communicating updates in near real-time between web payments, portal, central student database and distributed databases, supporting redundancy for off-line operation at the cashier station and manager station, as well as student mobility between schools.		

Mixed real-time and static elements		
Customizable touch screen software for key size, shape, colors, and number of items on screen and graphics		
Fully Integrated Back Office – Inventory, Order Entry/Purchasing, Bids, Menu Planning/Production, Nutrient Analysis, Free and Reduced Application Processing		
Automated synchronization feature for communicating in near real-time between Infinite Campus (SIS system) and your software		
Automated phone notification system		
Automated email notification system		

INVENTORY

Requirement:	Response	If not “Y” vendor explanation
Easily set an order hierarchy for each inventory item		
Identify food and non-food items		
Identify purchased and commodity items		
Support multiple vendors and supply units per items, including commodities		
Multiple vendors and prices per item, multiple supply units and packs per item, easily set and change priority for primary supplier, easily set and change priority for commodity items, set minimum ship quantity or dollar limit per vendor with warning alert to user during creation of orders		
Deplete spoilage and loss with reasons		
Inventory adjustment which inventory is decreased or depleted requires a reason. Reason should be prepopulated only requiring a mouse click to select		
Support multiple cost basis		
The option to set up cost basis using contract price, last price, weighted average, transfer cost, fair market value, delivery cost		
Automated order feature at the site level		
Ability to create an order based on par, predefined shopping lists, menu forecast, virtual stock level including on-hand plus on order minus committed stock, automatically split orders between vendor supplied, District approved and warehouse items		
Ability to change receiving screen orders		
Receiving screen match the original order or can be sorted by item, item code, or vendor code		
List orders by origin and delivery dates		
Ability to receive items manually or update receiving		
Allow items to be added while in the receiving screen or as separate item for shorted items received a different day		

Track variances between ordered and received counts and prices		
Allow sites the option to receive all items or to enter changes for items not received		
Physical Inventory Counts and Value Reporting		
Allow managers to reject items with reasons from prepopulated rejection list		
Track rejections for return to vendor or warehouse		
Support back order feature that can be turned on and/or off at District level		
Allow for the entry of additional cost such as delivery fee, processing fee, broker's fee, storage fees, and pass through value (net off invoice)		
Allow users to sort the receiving ticket in various ways in order to easily read and enter data from supplier invoice or packing slip		
Allow partial receiving with an option to back order		
User would be able to enter zero received for shorted/out of stock items and discrepancies with the option to back order the item		
Discrepancy report for variances between ordered and received items based on invoice		
Provides the ability to display/print a report based on invoice number/vendor which provides a listing of variances in price and quantity between ordered and received		
Entry of counts in both usage units and purchase units		
Site user has the ability to setup and control physical inventory storage locations		
Physical inventory count sheets printable to match storage locations established by site user		
Count data entry screen match printed physical inventory count sheets		
Display/Print variance report showing discrepancies in perpetual versus actual inventory balances		
Ability to use mobile scanning device to enter physical inventory		

CENTRAL PURCHASING

Requirement:	Response	If not "Y" vendor explanation
Ability to preselect specific site orders for automatic approval		
Automatically transform requisitions to purchase orders and supply orders based on supply chain hierarchy		
Summarize orders for multiple sites for drop ship by vendor		
Block items from appearing at specific sites		
Block sites from ordering specific items		

MENU PLANNING AND NUTRIENT ANALYSIS

Requirement:	Response	If not "Y" vendor explanation
USDA approved Nutrient Standard Menu Planning		
Complies with HHFKA / Preloaded with the latest USDA Child Nutrition (CN) database version		
Food based component menu planning		
Inventory/Commodity/Ingredient Management		
Recipe Management / Finished Product Management		
HACCP, Allergens and Target Temperature support		
Create, edit and delete menu templates for each meal and age group		
Create, edit and delete cycle menus from menu templates		
View average nutrition of a menu for 3-7 days with the ability to drill down to day, menu, pattern, recipe, and item		
Display costing per serving, cost per person, and food cost percentage		
Calendar menu can be printed and exported to other programs to allow for enhancement with graphic and additional notes		
Allow export of calendar into other programs to allow for enhancements such as allergen codes, nutrition, and export to HTML for web display		
Scale menu forecasts based on entering overall meal count forecast		
Editable Menu Item Counts		
Support editing of individual menu item counts for offer versus serve		
Distinguish between reimbursable meal forecast, adult, and ala carte forecast for nutrition analysis		
Analyze actual nutrition data after production record is complete		
Allow user to view actual nutrient analysis based on amounts entered from production records		
Support unlimited nutrition categories		
District can determine and set up categories based on needs – such as entrée, vegetable, fruit, etc.		
Transform recipe into finished goods without linking inventory items		
Every recipe is automatically an item		
Each inventory offers the option of multiple unit definitions, food component definitions, and links to nutrition data		
Recipes support multiple serving units		
Each recipe allows for multiple serving unit descriptions, food component definitions, and links to an ingredient and/or finished goods nutrition data		

Recipes are a finished product		
Every recipe is automatically a finished product upon production and can be ordered, received, counted, and wasted/spoiled		
Preloaded database to include USDA recipes and USDA items. Ingredients/Recipes can be downloaded, copied, linked and re-linked to and from the Child Nutrition (CN) database		
Downloaded ingredients/recipes cannot be edited by the user / site		
Site users cannot change recipes and/or ingredients other than portions needed for production		
Manual entry of nutrition data		
Allow District users to add nutrition received from manufacturer specifications and labels		
Ability to print (detailed) menu formatted reports showing each menu items nutrient contents, i.e. carbohydrates, fat, calories, etc. not just total nutrients for the day (summary)		

FOOD PRODUCTION

Requirement:	Response	If not "Y" vendor explanation
District user defined production records		
District can design production records based on their needs and criteria to include inventory item number, vendor item number, pack size, portions per pack and serving size. Information is automatically generated based on the menu		
Print production records based on local and state guidelines		
Display production record screen for data entry based on menu plan		
Hide or display ingredients of recipes		
Users may choose to display or hide ingredients on production records so that only the menu item displays		
Record target temperature, time of withdrawal of item from heating or cooling source, temperature at withdrawal, and holding temperature on serving line		
Automatically create finished goods for produced items		
Create pick list for ingredients based on recipes and automatically deplete stock based on recipes		
Batch requirements for multiple sites		
Allow users to set up various batch requirements based on portion size		
Automatically return finished goods to stock or spoil finished goods after posting usage		
Left-over Management		

Allow site manager to add leftovers to the menu		
Allow adjustment of preparation requirements based on leftovers available		
Automatically deplete raw ingredients from inventory when integrated with inventory module		
Record left-overs by disposition		
Allow site managers to choose between: Waste, Freeze (with use by date), Refrigerate (with use by date), and Use next day (with use by date)		

FREE AND REDUCED APPLICATION PROCESSING

Requirement:	Response	If not "Y" vendor explanation
Complies with current USDA and state application regulations		
Direct certification via file import		
Complete Verification module		
Integration with on-line web applications		
Automated year end rollover process		
Multi Track calendar		
Application program sharing (agree to share info)		
Notifies the user up to ten (10) days in advance when a "Pending" application expires		
Software generates Notification letters (Increase or decrease in benefits)		

ON-LINE WEB PAYMENT PROCESSING

Requirement:	Response	If not "Y" vendor explanation
Parent account management (ability for parents to set up email alerts on student's balance, set up automatic scheduled payments, able to view purchase history, divide payments between students in family and at different building sites)		
Ability to send balance alert email or text, both low and negative balance		
On-line payment via web or phone		
Ability for parents to use credit card, debit card or e-check		
Provides detailed monthly banking and financial reports		
Ability to setup recurring payments		
Low convenience fee for parents		

MEAL ACCOUNTABILITY

Requirement:	Response	If not "Y" vendor explanation
Complies with current USDA and state meal regulations		
Government reporting for claims and edit check		
Support Missouri State reporting		
Custom Report Generator		
User Definable letters		
User defined day-end reports		
Central POS item management and pricing		

BIDS

Requirement:	Response	If not "Y" vendor explanation
Ability to post bids request on the web and allow vendors to access and update their bid through the web		
Define publishing date, closing date, opening date, board approval date, award date, and effective date		
Create and copy bids		
Ability to email login information for bids to vendors based on bid criteria		
Provide interactive web portal for vendors to reply to bids		
Portal should allow vendors to enter the bid system and view the bid criteria, terms and conditions, bid items, whether alternates are allowed or not, specifications of alternate, alert vendor and procurement staff to deadlines, allow to print, allow vendors to update bid spreadsheet electronically		
Analyze bid base on Prime Vendor or Line Item		
Award Bid		
Provide report for board approval, provide award lists to vendors, provide complete bid audit to vendors on request via email		
Update inventory system		
Provide electronic updating of pricing and/or bid criteria (pack size, vendor product code, etc.) on effective date of bid		
Identify food and non-food items		
Identify purchased and commodity items		
Break out food and non-food items in the bid and create a total based on that criteria		
Ability to work with Interflex Bid Management Software		

Central Supply Distribution / Warehouse

Requirement:	Response	If not "Y" vendor explanation
Any site can be flagged as a central supply site capable of receiving supply orders and processing transfers		
Support unlimited truck routes		
Transfers automatically combine requisitions from a site for a date range and delivery date		
Ability to edit requisition tickets before generating pick tickets		
Generate pick tickets		
Transfers (call in orders) can be made without supply order		
Transfers can be made even if stock level goes below zero		
Supports transfers in any unit, usage unit, pack unit or purchase unit		
Ability to supply different pack unit than was ordered and display difference on transfer and shipping ticket		

FULLY INTERGRATED FRONT OFFICE

Requirement:	Response	If not "Y" vendor explanation
Centralized student database account management		
Enrollment interface		
Payment updated from web portal within 30 minutes		
Balances updated with school cafeterias within seconds		
Student/Adult accounts accessible from any school site POS with real time balances		
Ability to limit or restrict Student/Adult access at site level or site group (Elementary, Middle, High)		
Centralized payment and refund capabilities		
Capable of restricting student/adult account access by site groups (Elementary, Middle and High)		

CENTRAL OFFICE MEAL ACCOUNTABILITY AND REPORTING

Requirement:	Response	If not "Y" vendor explanation
SIF compliant		
Allow students and adults to access their accounts from any cafeteria with local or home authority		
Interface for accounting		
Generate USDA Edit Check report		
Generate USDA approved reimbursement report		
Support Provision One and Two		
Support Community Eligibility		
Support Provision Two Documentation (base year and succeeding years documentation)		

Custom Report Writer		
Allow the user to set up custom reports as needed without vendor tech support		
Export data to a variety of formats; Excel, Word, PDF, Text and CSV formats/spreadsheets		
Meal eligibilities categories are defined by the District office (free/reduced/paid/adult/employee, etc.)		
Variable report generating criteria		
The ability to generate reports based on all schools, groups of schools, or individual schools		
Reports screen includes a preview option		
Allow the user to select correct reports before printing it		
Reports can be set to automatically generate		
Reports are displayed on screen with the option to save, print or export the report		
End of day reports can be set up to generate after site completes end of day routine. Criteria for which reports to auto generate can be determined by executive users		
Centralizing importing and exporting of student pictures		
Pictures are loaded onto the centralized database		
Centralized keyboard and menu management		
Menu templates are set up by Central Office with site manager having access to change/update for that site only with drag and drop interface		
Easy to add new POS item		
Ability to edit existing products		
Products are automatically updated on the POS if they are changed in inventory		
Bank deposit reconciliation		
Allows for 30 operating day grace for previous year eligibility status and ability to add students to a “temporary” class during the grace period		
Allows “reclassification” of meals served based on eligibility status of date application was received and not just processed on a streamlined, one screen process		

SITE MANAGEMENT

Requirement:	Response	If not “Y” vendor explanation
Ability to take meal payments at the manager’s machine or at the cashier serving line		
Blind Balancing		
Blind balancing can be determined based on user category such as cashier, manager, etc.		
Day end reports		
Reports to be included as part of the end of day can be determined by the user		

Supports ID number up to 9 digits		
Supports touch screen option at cashier station		
Supports thin client POS terminal		
Menu items Lookup		
Menu items can be looked up by category or alphabetically		
Sales can be viewed remotely in live-time		
Automatically detects second reimbursable meal and charges ala carte or second meal price		
Automatically detects ID entry from students from other schools and processes their eligibility according to their eligibility at the home school		
Log reimbursable sales to students not in the database		
Allow user to enter these sales without leaving the sales screen		
Menu Templates		
Provide drag and drop graphical menu items for placement on menu buttons		
Allow cash, check, or charge for each transaction when appropriate		
Provide for patrons to charge up to a specified amount		
Display and prints a detailed report of student's daily, weekly, monthly, and yearly activity		
Determine overage and shortages for each cashier		
Ability to track/print an individual cashier (user) overages and shortages for a period of time		

POINT OF SALE

Requirement:	Response	If not "Y" vendor explanation
Support multiple Point of Sale terminals per school		
Touch screen accommodates right or left hand user interface		
Programmable keys with at least 80 item keys		
Purchases can be made with cash, check or from student's account		
Charging a meal requires pressing one button		
Support NO ID cash sales		
Support dual serving lines per cashier register		
Support prepayment at the POS		
Cashier can enter cash or check information, including check number without leaving the sales screen		
Apply change to account without leaving the sales transaction		
One button charging option while still in the sales screen		
Provide multiple methods for patron identification		

Query can be done by name, PIN, or ID		
Provide for bar-coded ID card		
Ability to use non-proprietary ID reader devices (Pin pad, barcode) for student identification		
Allow cashier to enter ID		
Student information and sales screen includes picture, notes, name, ID and account balance		
Ability for sales screen to notify cashier of account alerts (allergy, low balance, customizable notes and Student/Adult is from another site)		
Support sales by class roster on screen		
Allow correction voiding and correction of sales transaction based on user defined criteria		
Provide for the ability to limit or authorize voids and sales correction based on predefined hierarchy. Administrators and managers would be allowed; cashier would not be allowed		
Support grade, student, adult and employee sensitive pricing		
Emergency Roster		
Allow sites to print emergency roster by class or grade for manual sales entry, if needed		
Support electronic or manual cash drawers		
Support tiered meal pricing		
Allow for different meal pricing such as standard, premium and premium plus		
Patron picture displays at any terminal during sales		
Automatically synchronize student eligibility and demographic with the Central Office		
POS redundancy		
Cashier may still process transaction even if the connection with the network is lost		
Software must have a "Principals" or "House" account that student meals can be rung to		

Vending

Requirement:	Response	If not "Y" vendors explanation
Integrated with POS system		
Ability to control Breakfast and Lunch operational hours		
Ability to sale reimbursable meals at the students eligibility status		
Ability to sale reimbursable meals and ala carte sales		
Ability to use non-proprietary vending machine with VendNovation 5.81 software – 4 machines		
Vending transactions will be recorded on student accounts, if a student account is used		

Ability to stop selling reimbursable meals once it can no longer dispense a complete meal		
Ability to record pictures with account transactions		
Purchases can be made with cash or from student's account		
Ability to monitor temperature and lock down (prevent purchases) the machine if temperature has reached an unsafe temperature		
Cash deposit are recorded in conjunction with POS terminals and has the ability to indicated overages and shortages		
Ability to limit reimbursable meals transactions to one (1) meal per day		
Students must input a secure code i.e. birthday (mm\dd\yy) after scanning their id card		

Part III: SUBMITTALS

Proposal must be received by email by **November 4, 2016 @ 12:00 pm CST.**

Email bids in .pdf format should be sent to sealedbid@joplingschools.org by the date and time specified. Be sure that the subject line reads **Nutrition Services Software System** and the size of your submission does not exceed a total of 10 MB. When you send the bid to the district's secure mailbox, you should receive a complimentary "Thank You" auto reply message. If you do not receive this message please contact G.G. Mathis at 417-625-5200 ext. 2008 immediately.

- **Certification Form – Please Attach**

A copy of the formal agreement you may recommend between your firm and the District.

- **Part II: System Specification – Please Attach**

Vendor must respond to every functional, technical, and general implantation required contained in the Specifications section of the RFP.

- **Cost Proposal – Attachment A**

1. Price of Proposed Solution – To include Software License, Implementation Services, Peripherals and Additional Training
2. Annual License and Maintenance fee for nine (9) years, should not start until after year one (1)
3. List price for on-going training/workshops and continued professional development for staff

- **References – Please Attach**

Provide references, including References in our region that are similar in size and are using the proposed solution—preferably for at least two (2) years. For each reference, indicate how long the proposed solution has been in use.

- **Vendor Experience – Please Attach**

1. Describe vendor history. Provide a company profile that includes total number of employees and number of employees in Customer Service, Technical Support and Software Development.
2. Describe the vendor's project management and implementation services. Please include a sample implementation plan that lists all steps of the implementation process.
3. List the vendor's commitment and experience in working with K-12 school districts to implement their Nutrition Services Software System.
4. Provide number of K-12 school districts and the total number of schools using the proposed solution.

- **Felony Conviction Notification – Attachment B**

- **Federal Work Authorization (E-Verify) Addendum – Attachment C**

- **Federal Work Authorization Program Affidavit – Attachment D**

The District is not responsible for lateness or non-delivery by the U.S. Postal Service or by email to the District. The time and date recorded by the District shall be the official time of receipt. Late bids will not be considered. Joplin Schools is not responsible for non-delivery or non-receipt of electronic bids.

ATTACHMENT A

COST PROPOSAL

Offer must include a cost proposal matrix including all cost associated with meeting the requirements of the RFP. Services shall include: labor, materials, tools, equipment, supplies, trained personnel, insurance, travel and per diem, direct and indirect costs, overhead and any other changes necessary to provide a full software package in accordance with the requirements of this RFP.

Costs should be projected over the next ten (10) years. Year one (1) should include the first year's maintenance.

Include Added Value at no cost to the program.

Include estimated fees, if any, for acquiring/licensing updated versions of software. Indicate which, if any, essential hardware components may be purchased separately and provided by Joplin Schools and therefore excluded from the offeror's cost proposal.

Complete the following and submit with Cost Proposal Matrix.

Company Name

Authorized Company Representative Name (please print)

Title

Authorized Company Representative Signature

Date

Address

Phone

Fax Number

Email Address

ATTACHMENT B

FELONY CONVICTION NOTIFICATION

The person or business entity that enters into an agreement with this school district must give advance notice to the District of the person or an owner or operator of the business entity that has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.

The District may terminate this agreement with a person or business entity if the District determines that the person or business entity failed to give notice by the next preceding subsection, or misrepresented the conduct resulting in the conviction. The District will compensate the person or business entity for services performed before the termination of the agreement.

By submitting this offer and signing this certificate, this bidder:

- Certifies that the owner/operator has not been convicted of a felony, except as indicated on a separate attachment to this offer, and
- Certifies that no employee who will enter school buildings or potentially have contact with school children has been convicted of any felony or a misdemeanor involving violence or sexual abuse. It shall be the duty of the vendor to conduct the appropriate background checks on its employees and vendor agrees to share this information with the District upon request.

Vendor Name: _____

Vendor Address: _____

Vendor E-mail Address: _____

Vendor Telephone: _____ Fax Number: _____

Authorized Company Official's Name: _____
(Printed) Title

Signature of Company Official: _____

Date: _____

ATTACHMENT C

FEDERAL WORK AUTHORIZATION PROGRAM ("E-VERIFY") ADDENDUM

Pursuant to Missouri Revised Statute 285.530, all business entities awarded any contract in excess of five thousand dollars (\$5,000.) with a Missouri public school district must, as a condition to the award of any such contract, be enrolled and participate in a federal work authorization program with respect to the employees working in connection with the contracted services being provided, or to be provided, to the District (to the extent allowed by E-Verify). In addition, the business entity must affirm the same through sworn affidavit and provision of documentation. In addition, the business entity must sign an affidavit that it does not knowingly employ any person who is an unauthorized alien in connection with the services being provided, or to be provided, to the District.

Accordingly, your company:

- a) agrees to have an authorized person execute the attached "Federal Work Authorization Program Affidavit" attached hereto as Exhibit A and deliver the same to the District prior to or contemporaneously with the execution of its contract with the District;
- b) affirms it is enrolled in the "E-Verify" (formerly known as "Basic Pilot") work authorization program of the United States, and are participating in E-Verify with respect to your employees working in connection with the services being provided (to the extent allowed by E-Verify), or to be provided, by your company to the District;
- c) affirms that it is not knowingly employing any person who is an unauthorized alien in connection with the services being provided, or to be provided, by your company to the District;
- d) affirms you will notify the District if you cease participation in E-Verify, or if there is any action, claim or complaint made against you alleging any violation of Missouri Revised Statute 285.530, or any regulations issued thereunder;
- e) agrees to provide documentation of your participation in E-Verify to the District prior to or contemporaneously with the execution of its contract with the District (or at any time thereafter upon request by the District), by providing to the District an E-Verify screen print-out (or equivalent documentation) confirming your participation in E-Verify;
- f) agrees to comply with any state or federal regulations or rules that may be issued subsequent to this addendum that relate to Missouri Revised Statute 285.530; and
- g) agrees that any failure by your company to abide by the requirements a) through f) above will be considered a material breach of your contract with the District.

By: _____ Signature

Printed Name and Title: _____

For and on behalf of: _____ Company Name

ATTACHMENT D

FEDERAL WORK AUTHORIZATION PROGRAM AFFIDAVIT

I, _____, being of legal age and having been duly sworn upon my oath, state the following facts are true:

1. I am more than twenty-one (21) years of age; and have first-hand knowledge of the matters set forth herein.
2. I am employed by _____ (hereinafter "Company") and have authority to issue this affidavit on its behalf.
3. Company is enrolled in and participating in the United States E-Verify (formerly known as "Basic Pilot") federal work authorization program with respect to Company's employees working in connection with the services Company is providing to, or will provide to, the District, to the extent allowed by E-Verify
4. Company does not knowingly employ any person who is an unauthorized alien in connection with the services the Company is providing to, or will provide to, the District.

FURTHER AFFIANT SAYETH NOT.

By: _____ (Individual Signature)

For: _____ (Company Name)

Title: _____

Subscribed and sworn to before me on the _____ day of _____, 20 _____.

Notary Public

My commission expires: _____.

PART IV: GENERAL CONDITIONALS

RESPONSES & SUBSEQUENT CONTRACTS

SCOPE:

The following terms and conditions shall govern the submission of proposals and subsequent contracts.

DEFINITIONS AS USED HEREIN:

- a. The term "Request For Proposal" or RFP means a solicitation of a formal, sealed proposal.
- b. The term "Respondent" or "Firm" means the person or entity submitting a formal sealed proposal.
- c. The term "District" means Joplin Schools.
- d. The term "School Board" means the governing body of the District.
- e. The term "Contractor" or "Vendor" means the Respondent awarded a contract under this proposal.

COMPLETING PROPOSAL:

All information must be legible. Any and all corrections and /or corrections and/or erasures must be initialed. Each proposal must be signed in ink by an authorized representative of the Respondent and require information must be provided. The contents of the proposal submitted by the successful Respondent will become a part of any contract award as a result of this solicitation.

REQUEST FOR INFORMATION:

Any requests for clarification of additional information deemed necessary by any Respondent to present a proper proposal shall be made in accordance with the timeline. All requests will be responded to in writing by the District in the form of an addendum addressed to all prospective Respondents. Verbal responses and/or representations shall not be binding on the District.

CONFIDENTIALITY OF PROPOSAL INFORMATION:

All proposals and supporting documents will remain confidential until a final contract has been executed. All responses become the proper of Joplin Schools and will be part of public record.

SUBMISSION OF PROPOSAL:

Proposals are to be sealed and submitted prior to the date and time indicated on the Certification Form. At such time, all proposals received will be formally opened. The opening will consist of only the name and address recording of Respondents. Proposals received after the date and time indicated on the Certification Form shall not be considered. Proposals may be withdrawn or modified in writing prior to the proposal submission deadline. Proposals that are resubmitted or modified must be sealed and submitted prior to the proposal submission deadline. Each Respondent may submit only one (1) response to this proposal.

PROPOSAL OF ADDITIONAL SERVICES

If Vendor indicates an offer of goods and/or services in addition to those requested, such vendor may be added to the contract prior to signing at the sole discretion of the District. Cost for such offers shall be included in the proposal to ensure fairness of evaluation, however RFP will only be evaluated based on original criteria. Any additional goods and services will not affect the vendor's rating.

NEGOTIATION:

The District reserves the right to negotiate any and all elements of this proposal. The District will attempt to negotiate and contract for services described in this solicitation with the most qualified firm(s). If an agreement cannot be reached, there will be an attempt to negotiate a contract with the next most qualified firm(s). This process will continue until an agreement is reached.

TERMINATION:

Subject to the provisions below, any contract derived from this Request For Proposal may be terminated by either party upon thirty (30) days advance written notice to the other party; but if any work or service hereunder is in progress, but not completed as of the date of termination, then said contract may be extended upon written approval of the District until said work or services are completed and accepted.

(a) TERMINATION FOR CONVENIENCE

In the event that the contract is terminated or cancelled upon request and for the convenience of the District, without the required thirty (30) days advance written notice, then the District shall negotiate reasonable termination costs, if applicable.

(b) TERMINATION FOR CAUSE

Termination by the District for cause, default or negligence on the part of the contractor shall be excluded from the foregoing provision; termination costs, if any, shall not apply. The thirty (30) days advance notice requirement is waived in the event of Termination for Cause.

(c) TERMINATION DUE TO UNAVAILABILITY OF FUNDS

When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal year, the contract shall be cancelled and the contractor shall be reimbursed for the reasonable value of any nonrecurring costs incurred by not amortized in the price of the supplies or services delivered under the contract.

TAX EXEMPTION:

The District and its Agencies are exempt from state and local taxes. Sites of all transactions devised from this proposal shall be deemed to have been accomplished within the State of Missouri.

SAFETY:

All practices, materials, supplies, and equipment shall comply with the Federal Occupational Safety and Health Act, as well as any pertinent Federal, State and/or local safety or environmental codes.

RIGHTS RESERVED:

The District reserves the right to reject any or all proposals, to waive any minor informality or irregularity in any proposal, and to make award to the response deemed to be most advantageous to the District. The District reserves the right to use the services of multiple firms.

RESPONDENT PROHIBITED:

Respondents are prohibited from assigning, transferring, convening, subletting, or otherwise disposing of this proposal or any resultant agreement or its rights, title, or interest therein or its power to execute such agreement to any other person, company or corporation without the previous written approval for the District.

DISCLAIMER OF LIABILITY:

The District, or any of its agencies, will not hold harmless or indemnify any Respondent for any liability whatsoever.

HOLD HARMLESS:

The contractor shall agree to protect, defend, indemnify, and hold the School Board, Joplin Schools, its officers commissions, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character resulting from the error, omission or negligent act of the contractor, its agents, employees or representatives, in the performance of the contractor's duties under any agreement resulting from award of this proposal.

LAW GOVERNING:

All contractual agreements shall be subject to, governed by, and construed according to the laws of the State of Missouri.

ANTI-DISCRIMINATION CLAUSE:

No Respondent of this request shall in any way, directly or indirectly discriminate against any person because of age, race, color, handicap, sex, national origin, or religious creed.

CONFLICT OF INTEREST:

The successful Respondent shall not have conflicts of interest as to revenues derived from the results of tests or recommendations made on behalf of the firm. No salaried officer or employee of the District and no member of this provision renders the contract void. The contractor further covenants that in the performance of this contract no person having such interest shall be employed to work on this project.

COSTS:

All costs incurred in the preparation of the response to this request for proposal shall be the sole responsibility of the Respondent.

USDA NON-DISCRIMINATION STATEMENT:

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

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

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