



INVITATION FOR BID NUMBER AEPA IFB #007-D

FOOD SERVICE MANAGEMENT SOFTWARE AND HARDWARE

PART C – BID FORMS

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Bid Submittal Organization and Check List

1. Bid Submission instructions are found in Section E of Part A of the bid documents.
2. The Part C Bid Forms shall be submitted in both printed and electronic copy. Bidders shall include an exact paper copy of the electronic submission, paper copy(ies) of items that cannot be made a part of the electronic submission, and the electronic forms in the sealed bid package. In case of discrepancies, the printed responses will prevail over electronic submissions.
3. In order to insure that every bid receives a fair evaluation and comparison, it is required that each bid be organized in the following manner. A three-ring binder with an inside pocket and a set of dividers is required.
4. It is suggested that the bidder preparing a response check off each required item as it is completed. The same list will be used by AEPA evaluators to ascertain that the bid is complete.
5. Any submittals too large to secure in the binder must be clearly labeled with the name of the bidder.
6. One original copy of the bid shall be submitted.
7. All documents with signatures, shall have original ink signatures.
8. Electronic data must be provided on CD. Electronic media shall be clearly identified and labeled by including the vendor name, name of the bid and date. Electronic media must be placed in a protective pouch. Electronic price lists shall be in Microsoft Excel 2003 or less and shall allow for sorting on any of the fields listed below. Other documents may be submitted as Word or PDF files.

Divider	Form	Description	Signature Required	Hard Copy	Word or PDF File	Excel File
1	A	_____ Bid Affidavit Signature Page (Notarized Hard Copy)	X	X	X	
1	B	_____ Acceptance of Bid and Contract Award	X	X		
2	C	_____ Questionnaire for Bidders	X	X	X	
2	D	_____ Company Information	X	X	X	
3	E	_____ Exceptions to Terms, Conditions and Specifications	X	X	X	
4	F	_____ Category Questionnaire	X	X	X	
4		_____ Substantiating Documentation		X	X	
5	G	_____ Discount & Price Schedule (This will be a printout of the electronic pricing.)	X	X		X
6		_____ Appendix with Catalogs, Slicks, Model Information, etc.		X		
Left Pocket		_____ Bid Security Bond for \$25,000		X		
Left Pocket		_____ Electronic Media				

_____ Check or initial here after all questions have been answered and data provided as requested. (Omissions and errors may cause bid to be rejected.)

A. BID AFFIDAVIT SIGNATURE PAGE

AFFIDAVIT

1. The undersigned, duly authorized to represent the persons, firms and corporations joining and participating in the submission of the foregoing bid (such persons, firms and corporations hereinafter being referred to as the bidder), being duly sworn, on his/her oath, states that to the best of his/her belief and knowledge no person, firm or corporation, nor any person duly representing the same joining and participating in the submission of the foregoing bid, has directly or indirectly entered into any agreement or arrangement with any other bidders, or with any official of the *Member Agency*, or any employee thereof, or any person, firm or corporation under contract with the *Member Agency* whereby the bidder, in order to induce the acceptance of the foregoing bid by the *Member Agency*, has paid or is to pay to any other bidder or to any of the aforementioned persons anything of value whatever, and that the bidder has not, directly nor indirectly entered into any arrangement or agreement with any other bidder or bidders which tends to or does lessen or destroy free competition in the letting of the contract sought for by the foregoing bid.
2. This is to certify that the bidder, or any person on his/her behalf, has not agreed, connived, or colluded to produce a deceptive show of competition in the manner of the bidding or award of the referenced contract.
3. This is to certify that neither I, nor to the best of my knowledge, information and belief, the bidder, nor any officer, director, partner, member or associate of the bidder, nor any of its employees directly involved in obtaining contracts with the State of *Member Agency*, *Member Agency*, or any subdivision of the state has been convicted of false pretenses, attempted false pretenses, or conspiracy to commit false pretenses, bribery, attempted bribery or conspiracy to bribe under the laws of any state or federal government for acts or omissions after January 1, 1985.
4. This is to certify that the bidder or any person on his behalf has examined and understands the terms, conditions, scope of work and specifications, and other documents of this solicitation and that any and all exceptions have been noted in writing and have been included with the bid submittal.
5. This is to certify that if awarded a contract, the bidder will provide the equipment, commodities, and/or services to members and affiliate members of the Agency in accordance with the terms, conditions, scope of work and specifications and other documents of this solicitation in the following pages of this bid.
6. This is to certify that we have completed, reviewed, approved and have included all information that is required in Sections C, D, E, F and G of these bid forms.

Authorized Representative (Please print or type)

Mailing Address

Title (Please print or type)

City, State, Zip

Signature of Authorized Representative

Date Phone Fax

Subscribed and sworn to before me this _____ day of _____

Notary Public in and for County of, State of _____

My commission expires: Signature: _____

B. ACCEPTANCE OF BID AND CONTRACT AWARD

AEPA IFB 007- D – FOOD SERVICE MANAGEMENT SOFTWARE AND HARDWARE

**ACCEPTANCE OF BID
and
CONTRACT AWARD**

TO BE COMPLETED BY BIDDER

In compliance with the Invitation to Bid, the undersigned warrants that I/we have examined the Instructions to Bidders, and, being familiar with all of the conditions surrounding the proposed projects, hereby offer and agree to furnish all labor, materials, and supplies incurred in compliance with all terms, conditions, specifications and amendments in the INVITATION TO BID and any written exceptions to the bid. Signature also certifies understanding and compliance with the certification requirements of the Agency Terms and Conditions and the special Terms and Conditions. The undersigned understands that his/her competence and responsibility and that of his proposed subcontractors, time of completion, as well as other factors of interest to the Agency as stated in the evaluation section will be a consideration in making the award.

Company Name _____ Date _____

Company Address _____ City _____ State _____ Zip _____

Contact Person _____ Title _____

Authorized Signature (ink only) _____ Title _____

ACCEPTANCE OF BID AND CONTRACT AWARD TO BE COMPLETED ONLY BY AGENCY

Your bid for contracting services is hereby accepted. As contractor, you are now bound to sell the materials and services listed by the attached bid based upon the solicitation, including all terms, conditions, specifications, amendments as set forth in the Invitation for Bid. As contractor you are hereby cautioned not to commence any billable work or provide any material or service under this contract until contractor receives an executed purchase order from the Agency. The parties intend this contract to constitute the final and complete agreement between the Agency and contractor, and no other agreements, oral or otherwise, regarding the subject matter of this contract, shall bind any of the parties hereto. No change or modification of this contract shall be valid unless it shall be in writing and signed by both parties to this contract. If any provision of this contract is deemed invalid or illegal by any appropriate court of law, the remainder of this contract shall not be affected thereby. The term of the agreement shall commence on award and continue until February 28, 2008 unless terminated, canceled or extended. By mutual written agreement, the contract may be extended for three additional 12-month periods ending on February 28, 2009, February 29, 2010 and February 28, 2011.

Awarding Agency: _____

Agency Executive _____

Awarded this _____ day of _____

Contract Number _____

C. QUESTIONNAIRE FOR BIDDERS

Company Name _____

Please check Yes/No answers. "Days" requested are calendar days. If room provided is inadequate indicate, "see attached" and label the attachment with the question number.

1. Can your company serve all AEPA states with the best service offered? **YES** **NO**
2. Do you currently have representatives for all AEPA states? **YES** **NO**
3. (If no, a plan and timeline for providing these services is to be attached.)
4. Is your pricing guaranteed for the term of the contract? **YES** **NO**
5. For products on your price list, is shipping/handling included in the price? **YES** **NO**
If No, estimate S/H on purchases (% of purchase price, UPS, etc.) _____
6. Describe your return policy. What is your restock fee, if any? (Restock fee must not exceed 15%)

Describe any exclusions or limitations applicable to your return policy. _____

7. Will you offer Member Agencies a quick pay discount? **YES** **NO**
8. If YES, what is the discount (indicate %/number of days)? _____
9. How many line items are you offering under this bid category? _____
10. If some of the line items that you sell are not covered under this bid, do you have a way to block orders for those items? **YES** **NO**
11. Delivery of stocked items is promised within _____ **days**
12. What is your average time from receipt of order to shipping stocked items? _____ **days**
13. Delivery of non-stocked items is promised within _____ **days**
14. Do you offer an electronic ordering system? **YES** **NO**
15. Do you have minimum order requirements? **YES** **NO**
If yes, please describe. _____

16. Indicate the level of support you are offering in this bid. **A bid will be determined nonresponsive if this question is unanswered.**

Prices offered in this bid are:

- _____ a. The same as we offer on single school district bids.
- _____ b. The same as we offer to cooperatives and state purchasing departments.
- _____ c. Better than we offer to cooperatives or state purchasing departments.

If line b or c is checked, indicate the percent lower (on single items) than the best price offered to educational institutions, cooperatives, or state purchasing departments.

- _____ Two percent (2%) _____ Three percent (3%) _____ Four percent (4%)
_____ Five percent (5%) _____ Six percent (6%) _____ Other _____

17. Additional quantity or volume discounts are identified on the pricing page **YES** **NO**

D. COMPANY INFORMATION

Note: This is a sample form. Actual data must be provided on disk, and printed. Original must be signed and inserted in the bid after it is printed.

Proper evaluation of bidders requires information about their companies.

- 1a. Public Companies must provide their most recent yearly report to stockholders.
- 1b. *Private Companies must answer the questions below.*
 - a. Provide a brief history of your company that includes the type of business and its philosophy of doing business. If the bidder has recently purchased an established business, or has proof of prior success in this business, or a closely related business, please provide written verification.
 - b. Indicate the location of the headquarters of the company. List any branch offices in the state of any AEPA member. Provide the name, title, qualifications and experience of the your employee, that will coordinate the work and be the general contact for this contract.
 - c. For purposes of determining a bidder's ability to perform financially, attach a letter from your financial institution that indicates the line of credit available to you currently, and evidence of financial stability over the past three (3) years. This letter does not need to identify a dollar amount; instead, a credit range should be indicated. (For example, "credit in the low six figures" or "a credit line exceeding five figures").
2. Gaps sometimes exist between management (those who respond to IFB's) and sales staff (those who contact the public educational institutions) that results in problems. Provide the Names your key sales people, phone numbers and states for which they are responsible.

F. CATEGORY QUESTIONNAIRE

Describe your company’s ability to meet the following general specifications. Bidders will respond to each numbered item by checking the appropriate “Comply” or “Deviate” box. “No Bid” items shall be marked as such in the appropriate “Deviate” box. Details for deviations should be listed by item number on the Exceptions to Terms, Conditions and Specifications Form above.

	Requirement	Comply	Deviate*
F.1	The vendor must provide the necessary documentation and information requested throughout the Categorical Terms and Conditions above to allow the evaluation committee to develop an understanding, evaluate and determine if the proposed solutions meet the needs of the members and comply with the requirements of this category.		
F.2	Through written documentation the vendor must provide evaluation results from industry, educational and national organizations that have used, reviewed, evaluated and have indicated that the food service technology management solutions proposed herein have been implemented and meet the needs and requirements of food service department of various types and size institutions located within the 23 AEPA states.		
F.3	The vendor must provide a list of 3 current educational customers within the 12 of the 23 AEPA states who have implemented and used the proposed applications and hardware solutions within the last three (3) years. The list must include institution’s name, location, contact person, phone number, e-mail and a complete description of the application(s) and hardware solutions implemented.		
F.4	The vendor must provide a written narrative and other documentation to demonstrate the availability of resources, facilities and manpower to perform and provide all of the solutions and services proposed herein to meet members’ needs in all 23 states.		
F.5	The vendor must, through written documentation, demonstrate its experience in working with and providing educational institutions with food management technology solutions that meet or exceed those requested herein.		
F.6	The vendor must provide complete resumes of all of the professional staff that will be assisting the individual AEPA members with the design, installation, implementation and operation of the proposed solutions. The resumes shall include professional qualifications, experience with educational institutions, the role this individual(s) will play in execution of any award under this solicitation and the location in which they reside.		
F.7	The vendor must provide written documentation and other literature describing the food service technology management solutions offered, including its components, features, security attributes hardware, software and connectivity requirements. Discuss the methodology and technology to be used to address the following: a. Application/solution setup, configuration, user security/access controls and customization to meet individual institutions needs/environment b. Staff development and training on application/solution implementation and utilization		

	c. Ongoing support, updates and maintenance of proposed solutions and their components d. Optional product, services and consulting that may be available in these areas			
F.8	Vendor may be required, upon the request of the AEPA evaluation team, to make a presentation to the evaluation team regarding the food service technology proposed as a part of the evaluation process.			
F9	Vendor must provide the firm's history, background and stated qualifications demonstrate they possess the expertise, national recognition, ability and necessary human and financial resources to offer, deliver, implement and service the proposed solutions as required by this solicitation			
F10	Based on the documentation and information provided within the response, does the software applications and hardware solutions conform to, comply with and meet or exceed the minimum specifications and requirements of all 23 AEPA states?			
F11	Based on the documentation and information provided and research conducted relating to the your proposed solutions past experience and performance within the 23 AEPA States. Has your solutions demonstrated its capacity and ability to meet the needs of the individual AEPA member's agencies' current and on-going needs?	1 3		
F12	Based on your response and the research conducted, have you demonstrated your capacity and ability to obtain, develop, implement and maintain customized add-on solutions and software updates to meet current and future federal, 23 state and local operational and reporting requirements?			
F13	Based on your response and the research conducted have you demonstrated that the solutions offered utilize and comply with the most current accepted industry standards and take advantage of the latest proven technologies.			
F14	Based on your response and the research conducted have you demonstrated that the solution developed and implemented has a user friendly and comprehensive training program which will allow for a complete and successful install, implementation and continued operation of the individual solutions offered.			
F15	Based on your response and the research conducted have you demonstrated you have in place a technical support and service organization that possess qualified staff and support systems to meet the needs of all potential users within the 23 AEPA states.			
F16	Did you provide appropriate proof and justification why and how your products and services are the most advantages and cost effective solutions to AEPA and its members.			

G. DISCOUNT & PRICE SCHEDULE

Provide a comprehensive discount and price schedule for your bid. Describe the fees to be charged for services under the contract including, but not limited to:

1. The vendor shall provide complete price lists that clearly identify each of the solutions/components, equipment/hardware, training, support and maintenance programs with their individual costs and related fee structures. Optional add-ons and support agreements shall be described in detail individually with each of their associated costs.
2. The vendor shall provide a complete price list of all prices relating to products and services offered. Labor costs shall be expressed in hourly, daily rates or per item cost, if applicable. Likewise, if travel time, mileage, airfare, or per diem are to be charged, please state their costs and how they will be calculated.
3. If there will be a formal agreement between the vendor and the AEPA member's agency, please provide a sample copy of the document.
4. The evaluation team from each respondent's discount and price schedules will select items under each of the following identified pricing categories and develop a cost comparison matrix. The cost evaluation will be based on a point system with points being awarded for being low to high bidder for each cost evaluation item, that is, vendors, discounted price off normal retail prices, travel and living expenses, etc. If the evaluation team is unable to establish a cost for an item, the team will allot zero (0) points to that item, and if awarded a contract, cannot be used in providing products or services. The low bidder will receive the full point value and all other bidders will receive points calculated as follows:

(Lowest Bid / Other bid) x point value

A. Materials and Equipment

- 1) (15 points) 1 each standard point of sale workstation with required programming that includes menu options and cash drawer. Does not include any services/materials relating to running cable and/or connecting to main system/server.
- 2) (15 points) 15 each standard point of sale workstation with required programming that includes menu options and cash drawer. Does not include any services/materials relating to running cable and/or connecting to main system/server.
- 3) (15 points) 50 each standard point of sale workstation with required programming that includes menu options and cash drawer. Does not include any services/materials relating to running cable and/or connecting to main system/server.
- 4) (15 points) 1 each standard point of sale wireless workstation with required programming that includes menu options and cash drawer with battery and electrical power options.
- 5) (15 points) 1 each standard point of sale wireless workstation with required programming that includes menu options and cash drawer with battery and electrical power options.
- 6) (15 points) 15 each standard point of sale wireless workstation with required programming that includes menu options and cash drawer with battery and electrical power options.
- 7) (15 points) 50 each stand card reader/scanner for point of sale workstation with required programming/software that is designed and configured to work with items a through c above.
- 8) (15 points) 15 each stand card reader/scanner for point of sale workstation with required programming/software that is designed and configured to work with items a through c above.
- 9) (15 points) 50 each stand card reader/scanner for point of sale workstation with required programming/software that is designed and configured to work with items a through c above.
- 10) (15 points) 1 each input device (PAD) accepts pin numbers and swiped bar coded ID cards with necessary programming and accessories.
- 11) (15 points) 10 each input device (PAD) accepts pin numbers and swiped bar coded ID cards with necessary programming and accessories.
- 12) (15 points) 50 each input device (PAD) accepts pin numbers and swiped bar coded ID cards with necessary programming and accessories.

- 13) (15 points) 1 each standard portable PDA unit for taking and submitting food and non-food inventory items with necessary programming and accessories.
- 14) (15 points) 10 each standard portable PDA unit for taking submitting food and non-food inventory with necessary programming and accessories.
- 15) (15 points) 1 each standard Kiosk unit that can accept bills, coins and pin reader for credit cards includes stand and hardware for floor mounting, LCD display and receipt printer, programming and accessories.
- 16) (15 points) 1 package central office plus one school site package includes software, hardware and on site support.
- 17) (15 points) 1 package central office plus 11 school sites, package includes software, hardware and on site support.
- 18) (15 points) 1 package central office plus 41 school sites, package includes software, hardware and on site support.

B. Food Management Software by module.

- 1). Fully integrated database that collects, tracks, analyzes, summarizes and reports parent and student demographic, application and other information required by federal and state oversight agencies to conduct and manage a quality food service program
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- 2). Software solution for Menu Planning and Nutritional Analysis that includes USDA recipes, branded food items, analysis of menu plans, recipes and ingredients, cost analysis of menu and recipes, HACCP instructions and the generation of production worksheets.
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- 3). Back Office Management solution that includes order processing, menu plan forecasting, customized ordering system, bid analysis, perpetual inventory and purchasing.
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- 4). User friendly Point of Sale solution that includes the ability to generate and process free/reduced meal applications, class rosters used by teachers; account history and tracking student allergies; track free, reduced, full price, adult or other subsidized meals; transfer of student information to other schools; print letters; maintain history and cash management.
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- 5). Comprehensive solution for employee training and student nutrition education modules including but not limited to areas such as food safety, HACCP, food borne illness, cleaning, sanitizing, material safety data sheets, basic nutrition, food pyramid, balanced meal plan and nutrition games, puzzles and learning activities.
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- 6). A reporting component which can be customized and configured to assist in obtaining, compiling, analyzing, reporting and submitting various information required by federal, state and local oversight agencies.
 - a) (15 points) 1 school site

- b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
- C. Foods Service Management Software Complete Package. Complete and comprehensive Food Service Management software solution that includes all modules described in items a through f above.
 - 1). Education institution with one thousand students
 - 2). Education institution with six thousand students
 - 3). Education institution with twenty thousand students
- D. Provide an extensive and comprehensive training program that will facilitate and enhance the configuration, implementation, operation and troubleshooting of the proposed food service management solutions offered.
 - 1) On-Site
 - a) Per day per person
 - b) Travel and living expenses per day
 - 2). Remote (Web-based/telephone)
 - a) Per Hour
- E. Technical support services that will facilitate the troubleshooting and resolution of problems and/or issues that may arise with either hardware or software or the integration with other components of the food service management solution and/or existing administrative software and hardware.
 - 1). 12 month agreements by module (remote service)
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
 - 2). 12 month agreements by module (on-site service)
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
 - 3). 12 month agreement covering all modules (remote service)
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites
 - 4. 12 month agreement covering all modules (on-site service)
 - a) (15 points) 1 school site
 - b) (15 points) 26 school sites
 - c) (15 points) 41 school sites