



**INVITATION FOR BID NUMBER AEPA IFB 007-D**

**FOOD SERVICE MANAGEMENT SOFTWARE AND HARDWARE**

**PART B – SPECIFICATIONS**

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**1. Scope of Bid**

AEPA is seeking application software and/or hardware solutions that are specifically designed and configured to meet the needs of a modern educational institution’s requirements for Food Service Management Software and Hardware. Solutions offered must have the characteristics and functionality to allow for use by a member with less than one hundred students to a member with several thousand students. Successful vendors must demonstrate within their response that they possess the background, experience and resources to provide, deliver, install, configure, train and assist in the implementation and ongoing management of any proposed solution in all 23 AEPA states.

Solutions offered must be fully integrated, customizable, user friendly and utilize the latest technology available. The solutions also must be capable of gathering the data required by federal, state and local institutional regulations and requirements, while allowing the end user to prepare, generate and submit the reports required by these agencies. Finally, they should be easily integrated into and exchange data with other member’s existing administrative and student management systems which possess such functionality.

## 2. Anticipated AEPA Member Agency Participation

State	Participate (Yes/No/Undecided)	Estimated First year Purchase Volume	State	Participate (Yes/No/Undecided)	Estimated First year Purchase Volume
Arizona	No	N/A	Arkansas	Undecided	Unknown
California	Undecided	Unknown	Colorado	Yes	Unknown
Connecticut	Undecided	Unknown	Indiana	Yes	Unknown
Iowa	Undecided	Unknown	Kansas	Yes	\$20,000
Kentucky	Yes	Unknown	Michigan	Yes	Unknown
Minnesota	Yes	Unknown	Missouri	Yes	Unknown
Montana	Yes	\$30,000	Nebraska	Yes	Unknown
New Mexico	Yes	Unknown	North Dakota	Undecided	Unknown
Ohio	Yes	Unknown	Oregon	Yes	Unknown
Pennsylvania	Yes	\$70,000	Texas	Yes	Unknown
Virginia	Undecided	Unknown	Washington	Yes	\$50,000
Wyoming	No	N/A	Total		\$170,000

Participating in the solicitation does not guarantee that an AEPA Member Agency will enter into a contract with any vendor. Each AEPA Member Agency will make that determination after reviewing AEPA recommended bids. The AEPA Member Agency's contracting decision shall be final.

This is a new contract category for AEPA. Estimated first year volume for this solicitation is provided above where available. AEPA Member Agencies anticipate that purchase volume will increase in contract years 2-4. This information is provided as an aid to vendors in preparing bids only. It is not to be considered a guarantee of volume under this IFB. The successful bidder(s)' discount and pricing schedule shall apply regardless of the volume of business under the contract.

## 3. Glossary of Terms

**AEPA Member Agency:** A state cooperative purchasing agency recognized by AEPA to represent a specified state in contracting activities associated with this solicitation.

**ANSI** – American National Standards Institute

**Contracting AEPA Member Agency:** An AEPA member agency that enters into a contract as a result of this solicitation

**CPSC** – Consumer Product Safety Commission

**CPU** – Central Processing Unit

**EIA** – Electronic Industries Association

**EPA** – Environmental Protection Agency

**FCC** – Federal Communications Commission

**GUI** – Graphical User Interface

**HACCP** – Hazard Analysis and Critical Control Points

**Member:** A public school district or other qualifying agency authorized to use the contracts of an AEPA Member Agency.

**IEEE** – Institute of Electrical and Electronic Engineers

**ISO** – International Standards Organization

**ISO 9000/9001** – International Standards Organization Quality Standards

**MVIP** – Multi-Vendor Integration Protocol

**NBFU** – National Board of Underwriters

**NEC** – National Electrical Code

**NFS** – National Sanitation Foundation

**NFPA** – National Fire Protection Agency

**OSHA** – Occupational Safety Hazard Administration

**POS** – Point of Sale

**SCSA** – Signal Computing Systems Architecture

**TIA** – Telecommunications Industries Association

**USFDA** – United States Food & Drug Administration

**USDOE** – United States Department of Education

**USPHS** – United States Public Health Service

**UL** – Underwriters Laboratories is an independent organization whose responsibilities include rigorous testing of electrical products. When products pass these tests, they can be labeled (and advertised) as “UL listed”. UL tests for product safety only.

**Vendor:** Individual or entity providing goods and services to AEPA members based on the specifications of this solicitation.

#### 4. Special Terms & Conditions

The following special terms and conditions are in addition to the applicable general terms and conditions that appear in part A. Please review them and complete the Exceptions to Terms, Conditions and Specifications Form in Part C, Bid Forms.

- A. The vendor must demonstrate that they have and can provide, install and support the food service management solutions offered under this category in all 22 states.
- B. All hardware and software proposed under this category must be designed and manufactured to conduct and manage a food service program as described and defined within this category. The vendor must provide descriptive product literature and other related information for all products and software offered. The information provided must be sufficient for an evaluation committee to evaluate and determine if the solutions offered comply with and meet the needs and requirements of the food services programs by educational institutions in all 22 states.
- C. All equipment must be new, unused and listed by UL for the purpose intended. The vendor will not provide equipment that has been used for demos without the prior approval of the individual AEPA agencies and their individual member. If a manufacturer refurbishes equipment and markets it as new, the vendor must clearly identify in their response that they intend to offer such equipment as one of the options available to AEPA members. Refurbished equipment must be certified and warranted and all terms, conditions and stipulations regarding this equipment must be provided to the member in writing.
- D. All solutions offered must comply with the current applicable provisions, standards and requirements of the USPHS, NBFU, OSHA, NSF, NFPA, NEC, UL, FCC, ANSI, ISO, IEEE, EIA, USFDA, EPA, USDOE and each of the 22 state agencies' rules, regulations and guidelines relating to student nutrition programs operations and reporting requirements.
- E. If there is computer network cabling installation that is considered construction, requiring a state contractor's license and is a part of delivering a proposed solution, the vendor must coordinate with the member to have a properly licensed low voltage contractor do the installation. This category does not allow for or permit the vendor to provide construction services.
- F. If a member's existing computer workstations, servers and network infrastructure are to be utilized as part of a proposed solution, the vendor is solely responsible for the assessment. This assessment includes: conducting, evaluating, analyzing and determining the adequacy of the existing equipment and network system in regards to incorporating them as part of the proposed solution. Upon completion of this assessment, if the vendor determines that there are parts of the existing systems that are not adequate, this must be clearly identified, communicated and resolved with the member prior to vendor accepting the individual agencies' purchase order for the project.
- G. The vendor must provide on an as-needed basis technical and support services. In its response, the vendor must provide complete and detailed information on the types and levels of support available; the methods and delivery systems to be utilized, along with the associated costs. Other terms utilized to identify these services are software and hardware support or maintenance agreements.
- H. Throughout the life of the contract and any extension thereof, the successful Vendor will provide the following Help Desk services in the following manner and delivered without charge. Support shall be provided for material covered in a course and assistance with any problems or questions that may arise during a user experience with an offered course or an administrator attempting to implement a training program for their school or agency.
  - 1). Telephone Support: Vendor will provide unlimited telephone support to Buyer Agency for material covered in a course and/or course outline for at least three (3) months following the course.

- 2). Service Level: Vendor will guarantee to respond between 7:00 a.m. EST and 5:00 p.m. PST and within four (4) business hours if being contacted with a request for support.
- 3). Telephone Number: The support telephone number will be a local or a toll-free number.
- 4). Electronic Mail: The Vendor may supplement telephone support services through an electronic mail process proposed by the Vendor and approved by the associated AEPA Member Agency.

## 5. Specifications

- A. The master database and administrative food service application characteristics include, but are not limited to the following:
  - 1). Should utilize a user friendly, graphical user interface (GUI) and have an easily accessible help screen for new or inexperienced users.
  - 2). Should utilize Windows XP or NT or better operating environment and/or nationally utilized mainframe systems.
  - 3). May include, but is not limited to the following modules/components:
    - a) Parent and student master database
    - b) Federal free and reduced program: application, tracking, notification, reporting and management system
    - c) Menu planning, scheduling, and meal nutritional analysis
    - d) Inventory management and control (food, non-food and equipment)
    - e) Procurement management and control (ordering, tracking and receiving goods and services)
    - f) Point-of-Sale
    - g) Financial management and control (compiling, tracking, analyzing, summarizing sales, labor, supplies, materials and operating costs)
    - h) Report generation and external data submittals (daily/weekly, monthly sales, inventory, financial, federal and state reports)
    - I) Administrative allowance input and export of data
  - 4). Student accounts in the master database must be accessible from any of the modules being used by the member. Information shall be shared and updated between the modules on a real time basis.
  - 5). The application must be equipped with an image capture feature that allows photos to be automatically cropped, scaled and stored for visual identification. The photos can be printed on the identification cards or available on the POS monitor for identification purposes by food services workers.
  - 6). Immediate updating of student records through an integrated interface with the members master database must be included. This is to ensure that only eligible students are being provided federal subsidized meals.
  - 7). All activities and transactions processed through the system must be fully auditable. A comprehensive transaction log must be available in printed form after each meal, cashiers must be identified by a code, the total quantity of each food item must be reportable, and a summary of prepayments received after each meal and summaries of cash accounts must be available. The ability to compare actual participation in free and reduced meals programs with those eligible must be reportable.

- 8). The ability to control daily production and sales with purchasing and inventory must be a feature of the system. The reports generated by the system shall include, but not be limited to daily/monthly receipts, daily/monthly participation and daily/monthly count verification. The variance between book in inventory and actual inventory must be reportable at the time of a physical inventory.
  - 9). The system must be able to incorporate user created recipes whose ingredients are inventoried and priced and that can be costed on demand. The ability to evaluate the nutritional contribution of each recipe and report the total nutritional profile of a menu is required. A module that maximizes the use of USDA commodities should be available. A single master inventory file that keeps records by site or by institution that is then able to recommend purchasing requirements based on menu plans is required.
  - 10). The financial management and costing system account number structure must be flexible to accommodate the 22 states' Chart of Account Structure.
- B. The point of sale (POS) component may include, but is not limited to the following:
- 1). The system may be a piece of hardware designed as a specialized device configured for food service POS operations or may run on a PC computer configured to act as a POS station.
  - 2). All hardware configurations must utilize the latest CPU, operating systems and networking technology. All equipment must meet or exceed all current industry standards.
  - 3). Vendor is encouraged to offer a variety of alternative data entry devices such as bar code scanners, wands, touch screens and similar devices.
  - 4). The POS systems shall have devices that serve as both a data entry center and as a cash register. The POS keyboard devices must be programmable, allowing the addition of special codes and food menu items in order to enable cafeteria workers to use the system in a time efficient manner. A keyboard template (grid) must be available for use with a standard keyboard. A single meal must be able to be entered by a single keystroke to facilitate processing meal transactions.
  - 5). Student accounts in the master database must be accessible at the POS station using a barcode-imprinted identification card that includes a PIN number and any applicable identification information. The system must allow for scanned and manual access.
  - 6). The POS system shall have a variety of ways to access the student database to verify a sale. The system must be able to accept prepayments during the meal period and allow for a discounted rate or provide additional meals for deposit. The system must allow for charges, with the ability to establish an absolute limit beyond which charges will not be permitted. The system must also permit a la carte items to be purchased and must provide a beyond use of card alert, if in fact, the student is purchasing a second meal, the second meal must not be reported in the daily meal claim, but in a summary journal. The program must conform to all the federal guidelines for reimbursable meals.
  - 7). The system must automatically save sales transaction information on a regular basis. This information should be automatically updated on the server to prevent information loss due to a power failure.

## **6. Substantiating documentation**

The information requested below will be used by AEPA and AEPA Member Agencies to substantiate compliance with the requirements of the solicitation. Bidders are strongly encouraged to provide complete and accurate information. Failure to provide complete information, as requested, may result in a determination of the bid being non-responsive. Include your printed and electronic responses in Part C, Bid Forms.

- A. 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.
- B. 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 22 AEPA states.
- C. The vendor must provide a list of 3 current educational customers within the 12 of the 22 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.
- D. 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 22 states.
- E. 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. 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.
- G. 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:
  - 1). Application/solution setup, configuration, user security/access controls and customization to meet individual institutions needs/environment
  - 2). Staff development and training on application/solution implementation and utilization
  - 3). Ongoing support, updates and maintenance of proposed solutions and their components
  - 4). Optional product, services and consulting that may be available in these areas
- H. 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.