



Irvine Unified School District  
Orange County, California

**RFP# 13/14 – 0008 IT**  
**FOOD SERVICE MANAGEMENT SYSTEM PROJECT**

**PROPOSAL DEADLINE: March 7, 2014, 2:00 PM**

**Contact: Tanisha Grattan, Purchasing Dept.**

Irvine Unified School District  
5050 Barranca Parkway, Irvine, California 92604  
Telephone: (949) 936-5212 Fax (949) 936-5219  
Email: [TanishaGrattan@iusd.org](mailto:TanishaGrattan@iusd.org)

All dates subject to change at the sole discretion of IUSD. Please continue to check our website throughout the proposal and selection periods for updates.

[http://iusd.org/district\\_services/purchasing/index.html](http://iusd.org/district_services/purchasing/index.html)



## NOTICE OF REQUEST FOR PROPOSALS

### **DISTRICT: IRVINE UNIFIED SCHOOL DISTRICT**

Proposal Submission Deadline: March 7, 2014 at 2:00PM

Place of Proposal Receipt: Irvine Unified School District, 5050 Barranca Parkway,  
Irvine, CA 92604

NOTICE IS HEREBY GIVEN that the Irvine Unified School District of Orange County, California, acting by and through its Governing Board, hereinafter referred to as "District" will receive up to, but no later than, the above stated Proposal Submission Deadline, sealed Proposals at the place identified above for its upcoming **RFP # 13/14- 0008 IT – FOOD SERVICE MANAGEMENT SYSTEM PROJECT.**

Go to [http://www.iusd.org/district\\_services/purchasing/index.html](http://www.iusd.org/district_services/purchasing/index.html) to download the full Request for Proposals.

Time is of the Essence. The District reserves the right to reject any and all submissions, to negotiate with any or all responsible submitters, and to waive any deficiencies, irregularities or informalities in any proposal or during the evaluation process.

Any questions regarding this Request for Proposals shall be directed to Tanisha Grattan, Irvine Unified School District by e-mail only. Please e-mail [tanishagrattan@iusd.org](mailto:tanishagrattan@iusd.org). All responses will be posted on the District's website. Questions must be received by 2:00pm on February 27, 2014.

Publish: Orange County Register -  
February 14, 2014; February 21, 2014



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## 1.0 Background and Overview

### 1.1 Overview

The Irvine Unified School District is comprised of a community of learners, committed to the highest quality educational experience we can envision. IUSD educates a diverse student population numbering over 30,000 (K-12), in one (1) early childhood learning center, twenty (20) elementary, two (2) K-8 schools, six (6) middle schools, four (4) comprehensive high schools, and one (1) continuation high school. IUSD is a growing district, and will open two (2) additional elementary schools in the fall of 2014. The district serves a diverse population of students, with participation in the Free and Reduced Price Meal program at approximately 13% of current enrollment. The district's [strategic plan](#) is driven by our mission of enabling all students to become contributing members of society, empowered with the skills, knowledge, and values necessary to meet the challenges of a changing world.

IUSD is renowned for its nationally recognized schools, student performance well-above state and national comparisons, and comprehensive programs in academics, the arts, and athletics. The District benefits immensely from a deeply engaged and supportive community. The District is issuing this RFP to provide a comprehensive management system to support Nutrition Services.

### 1.2 Requested Services

This solicitation is intended to provide a mechanism for the District to procure software and services to support efficient food service, payment, distribution, and accountability for the Nutrition Services program:

- Point-of-Sale: An intuitive, efficient system to support food service, accounting, and reporting.
- Application Processing: Streamlined, online and scanned processing of applications for the Free and Reduced Price Meal Program.
- Payment: Solutions for on-line prepayment and account balance information, as well as systems to support quick processing of on-site payments by parents and students.
- Back-of-House: Inventory, procurement, distribution, and accounting solutions to support the operations of the central kitchen and warehouse, and create efficiencies in management of the Nutrition Services program.
- Implementation Services: Project management, data migration/integration, system configuration, and comprehensive, “Turn-Key” training to support an expedited and thorough rollout.
- Support: Highly available, professional, ongoing support for the solution.

### 1.3 Current Environment

Point of Sale: IUSD uses Meals Plus (in production for approximately one year). Student identification is currently done through through pin pads.



**Free and Reduced Price Meal Applications:** Free and Reduced Price Meal Applications are also through Meals Plus.

**Pre-Payment:** Pre-Payment is hosted by eFunds.

**Back-of-House:** IUSD does not currently have an integrated Back-of-House management system. Inventory and shipping information are tracked using Excel, paper forms, and other resources. Meal Planning is completed in a third-party application.

**Student Information System (SIS):** IUSD uses an on-premise installation of Eagle Software's Aeries Student Information System. 99% of IUSD students have at least one parent registered on the Aeries Parent Portal to receive online report cards, school announcements, and other progress reporting information.

**School-Home Communications:** IUSD uses SchoolMessenger for school-to-home communications.

**Authentication:**

**Staff and Students:** IUSD uses Microsoft Active Directory for authentication for all staff and students.

**Staff E-mail:** IUSD staff, excluding as-needed and substitute workers, use Microsoft Exchange email provided by IUSD through Office 365 for Education (Microsoft-hosted).

**Irvine Records Information System (IRIS):** The IUSD employee information system was built in house (SQL Backend, Access Frontend).

#### **1.4 Period of Performance**

The initial term of the contract resulting from this RFP shall be one (1) year, with four (4), one-year renewal options available to the District.

Implementation timelines shall be discussed with the successful Respondent. IUSD's hope is that the successful respondent will be able to support a complete implementation of at least the Front-of-House solution prior to the start of school for the District's year round campuses (July 28, 2014). IUSD's desired implementation approach is a turn-key, simultaneous implementation at its campuses with experienced trainers provided by the Provider.



## 2.0 Instructions to Providers

### 2.1 Proposal Deadline and Submission

Proposals must be received no later than **2:00 PM PST on March 7, 2014.**

Provider to submit:

- (1) Master Bound Hardcopy Proposal
- (4) Additional Bound Hardcopy Proposals
- (1) Electronic Proposal on CD

Proposal shall be submitted to:

Tanisha Grattan, Purchasing Dept.  
 Irvine Unified School District  
 5050 Barranca Parkway, Irvine, California 92604  
 Telephone: (949) 936-5212 Fax (949) 936-5219  
 Email: [TanishaGrattan@iusd.org](mailto:TanishaGrattan@iusd.org)

### 2.2 Delivery to District

A written Proposal must be received at the District Office, no later than the Proposal Submission Deadline specified in the Calendar of Events. No telegraphic, facsimile, or emailed Proposal will be accepted. The District assumes no responsibility for late delivery.

If discrepancies between two or more copies of the Proposal are found, the Proposal may be rejected. If, however, the Proposal is not rejected, the master copy will provide the basis for resolving such discrepancies.

### 2.3 Withdrawal, Resubmission or Modification

A Provider may withdraw the Proposal at any time prior to the Proposal Submission Deadline specified in the Calendar of Events, by submitting a written request for its withdrawal to the Purchasing Department, signed by the Provider or authorized agent. The Provider may thereafter submit a new or modified Proposal prior to the Proposal Submission Deadline. Modification offered in any other manner, oral or written, will not be considered. A Proposal cannot be changed, corrected, or withdrawn after the Proposal Submission Deadline.

### 2.4 Calendar of Events

Event	Details	Date
Request for Proposals Posted		February 14, 2014
RFP Advertisements	Orange County Register	February 14, 2014 February 21, 2014



Event	Details	Date
<b>Last Day to Submit RFIs/Questions</b>	TanishaGrattan@iusd.org	February 27, 2014 2:00pm
<b>Response to Questions/RFIs Posted</b>	IUSD Website	March 3, 2014
<b>Proposals Due</b>	5050 Barranca Pkwy Irvine, CA 92604	March 7, 2014 2:00pm
<b>Evaluation and Selection of Finalist(s)</b>		March 14, 2014
<b>Finalist Presentations</b>		March 24-26, 2014
<b>Intent to Award Posted</b>	IUSD Website	April 18, 2014
<b>Protest Deadline</b>		April 25, 2014
<b>Board of Education Action</b>		May 6, 2014

All dates subject to change. Amendments to these dates, and other aspects of the RFP, will be posted at [http://www.iusd.org/district\\_services/purchasing/index.html](http://www.iusd.org/district_services/purchasing/index.html).

## 2.5 Proposal Submission Checklist

- Part 1: Vendor Support and Ability to Perform
- Part 2: Front-of-House Requirements
- Part 3: Back-of-House Requirements
- Part 4: Reporting and Analytics
- Part 5: Technical Requirements
- Part 6: Desired, Additional, and Future Functionality and Services
- Part 7: Cost
- Part 8: Exceptions
- Part 9: Required Forms
  - Proposal Submission Checklist
  - Purchase Agreement
  - Acknowledgment of Amendments to RFP
  - Provider Representation and Certification
  - Noncollusion Declaration
  - Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
  - Certification on Restrictions on Lobbying



Part 9: Optional Forms

*Optional at time of proposal submission. Required of Selected Provider within ten (10) days of Notice of Intent to Award*

- Workers' Compensation Certificate
- Drug Free Workplace Certification
- Tobacco Use Policy
- Notice to Contractors Regarding Criminal Records Check
- Criminal Records Check Certification by Contractor
- W-9

## 2.6 Preparation

A Proposal should be prepared in such a way as to provide a straightforward description of Provider capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, and on completeness and clarity of content.

The completed documents(s) should be without interlineations, alterations, or erasures. The Proposal should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely. It is more desirable to give additional information than less when the answer could be misinterpreted. There should be no attachments, enclosures, or exhibits other than those considered by the Provider to be essential to a complete understanding of the Proposal submitted.

## 2.7 False and Misleading Statements

A Proposal which contains false or misleading statements, or which provide references which do not support an attribute or condition contended by the Provider, may be rejected. If, in the opinion of the District, such information was intended to mislead the District in its evaluation of the Proposal and the attribute, which is a condition or capability of a requirement of this RFP, the Proposal shall be rejected.

## 2.8 Request for Information (RFI)

Contractors are encouraged to ask questions during the open RFI period. All questions shall be in writing and submitted to the listed contact person. All responses shall be in writing by an authorized District employee or their designated representative. Questions must be received by the deadline specified in the Calendar of Events. There shall be no verbal understandings or clarifications recognized by the District. Responses to all RFIs received will be posted on the District Website.





**2.9 Amendments to the RFP**

During the RFP period, the District may amend the RFP. Amendments to the RFP and/or calendar of events will be posted at

[http://www.iusd.org/district\\_services/purchasing/index.html](http://www.iusd.org/district_services/purchasing/index.html).

**2.10 Limits of the RFP**

IUSD reserves the right to reject all proposals and will determine what future action, if any, will be taken. All costs incurred in the preparation or submission of a proposal shall be entirely the responsibility of the Provider and shall not be chargeable directly or indirectly to the District.



### 3.0 Evaluation and Award

#### 3.1 General Information

Award will be made to the Provider offering the most advantageous proposal for Food Service Management System. Irvine Unified School District shall not be obligated to accept the lowest priced proposal, but will make an award in the best interest of the District after all factors have been evaluated. IUSD may award the Front of House and Back of House solutions to separate providers as a result of this RFP. All proposals received in response to this RFP will receive a fair and impartial evaluation by the District. In conducting this evaluation, the District may obtain and use information, in addition to that contained in the proposals, from any source desired. Customers on each Provider’s reference may be contacted, as may other customers selected by the District and listed by the Provider as a reference.

The District shall make its evaluation in its sole discretion and its decision shall be final. Public Contracts Code section 20118.2 shall govern the evaluation of proposals, selection of provider, and contract negotiations associated with this Request for Proposals

#### 3.2 Requirements

Providers must meet all of the minimum requirements defined in this RFP, including meeting mandatory system requirements, performance expectations, and general terms. Providers that do not meet the minimum requirements may be disqualified.

#### 3.3 Scoring

Qualifying Providers will be evaluated on their complete proposal, based on the following considerations:

Factor	Weight
Price	20%
Front-of-House Solution	25%
Back-of-House Solution	15%
Reporting and Analytics	10%
Vendor Support and Ability to Perform	20%
Technical Requirements	10%

Interviews/Provider Presentations:

The District reserves the right to conduct in-person interview and/or require a formal presentation for all or a portion of the responding Providers.

Site Visit:

The District reserves the right to visit one or more of the Providers current customer sites.



**Discussions:**

Discussions may, at the District's sole option, be conducted with responsible representatives who submit proposals determined to be reasonably susceptible of being selected for an award. Discussions may be for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Firms shall be given fair and equal treatment with respect to any opportunity for discussion and written revision of proposals. Revisions may be permitted after submissions and before award for obtaining best and final proposals. In conducting discussions, the District will not disclose information derived from proposals submitted by competing firms.

**3.4 Award**

The District will provide all responding providers with a Notice of Intent to Award to Provider. Any Provider protesting the award of a contract to another Provider must do so, in writing, by the deadline indicated in the Calendar of Events. The Award of the RFP will be voted on by the Board of Education at a public meeting.

**3.5 Contract and Warranties**

Following the Award of the RFP, the District will prepare and negotiate its own Agreement with the selected Provider to deliver the proposed products and services. The resulting agreement shall conform to the terms and conditions set forth in this RFP and the District's standard agreement (included in the Appendices of this document). Any exceptions or proposed alterations to conditions and requirements defined in this document and the District's standard agreement must be included in the Provider's proposal.

The Selected Provider will guarantee that the Proposed Products and services shall conform in all material respects to the District's specifications in this RFP and the Selected Provider's Documentation accompanying or referred to in this RFP.

If a contract is awarded as a result of this procurement process all warranties made by the Selected Provider, including the Provider's response to the RFP, shall be incorporated into the Agreement and shall be binding upon the Selected Provider. This RFP and the Selected Provider's Proposal will become a part of the Agreement. Any Proposal attachments, documents, letters and materials submitted by the Provider shall be binding and may be included as part of the Agreement. Submission of a successful Proposal is not the end of the contractual process; further negotiation over the Agreement terms and conditions will be necessary, which, in and of itself, could change the Selected Provider.



## 4.0 Proposal Format

### 4.1 General

These instructions prescribe the mandatory Proposal format and the approach for the development and presentation of Proposal data. Proposal format instructions must be adhered to, all questions must be answered, and all requested data must be supplied. Provider response to each of the minimum requirements in this RFP is required. Failure to respond or non-adherence to any minimum requirement in this section may be cause for the Proposal to be rejected.

In addition to responding to the defined minimum requirements, IUSD encourages providers to submit information about additional functionality not specifically requested in the RFP. Providers' Proposals should be constructed to provide a complete picture of the features of the proposed solution, the firm's ability to perform, and functionality or services that may distinguish the proposed solution from other competitive offerings. Proposals will be evaluated both on the satisfaction of the District's minimum requirements, as well as the additional information submitted by providers to depict their complete solutions.

Each Provider shall submit a Proposal with all information requested. The Proposal should be as clear, complete and consistent as possible. An editable response template shall be available on the IUSD website with this RFP.

### 4.2 Proposal Content and Sequence

The completed Proposal must include the following items, with format and content as described.

#### Part 1: Vendor Support and Ability to Perform

Provide a brief description of your firm, as well as any other firms joining with your firm to provide services. This description should include a history of the firm(s), number of employees and organizational structure of the firm(s). This section should provide background information that supports your firm's ability to provide the requested services effectively and reliably.

In addition, provide detailed information on the proposed scope of installation services, including resources dedicated for implementation/project management, system configuration, data integration, transition from existing services, and timeline. In addition, providers should provide evidence to support the reliability of their system and the availability and expertise of support resources.

Minimum Requirements/Supporting Information:

#### Company Characteristics

**P1.1** List of company contacts, with description of their roles and backgrounds that



- will be assigned to IUSD’s anticipated implementation and ongoing support.
- P1.2** Demonstration of a strong background in providing food service management solutions for K-12 education customers. Proposal should evidence the provider’s awareness of and support for the unique needs of education clients.
- P1.3** Evidence of long-term fiscal stability. Artifacts may include fiscal reports or recent audit results that demonstrate consistent and current financial security.

### References

- P1.4** Provide a minimum of five (5) references from comparable local education agencies where the Proposed Produces are in active use. Reference information must include:
- Organization Name and Location, and Name, Title, and Contact Information of a company contact who has ongoing involvement in operations of the system and is knowledgeable about the implementation.
  - List of products and services used by the organization and the length of time those products have been in productive use. (References must be from organizations using the same or similar products and services).

### Implementation

- P1.5** Identify Provider resources/staff that will be assigned to the implementation, including estimated availability and anticipated time commitment, years of experience with the company, and recent projects similar in scope to IUSD’s implementation. Describe the amount of on-site and remote time the company is expecting to devote to the implementation. For the proposed project manager, include a list of recent sites where he/she was responsible for the implementation.
- P1.6** Draft implementation plan showing a general outline of essential tasks/milestones and the overall timeline for implementation.
- P1.7** Describe your business process review approach and support for configuring the system to meet IUSD needs.
- P1.8** Defined list of District and Provider responsibilities during the implementation process.



**P1.9** IUSD desires to cutover Front-of-House to the selected system by mid-July 2014 to support school opening of our four year-round campuses. IUSD expects to cutover the remaining sites upon their school opening in September. IUSD would like a turn-key training/implementation approach to ensure a full transition to the new system for the 2014-15 school year. Proposals should include a detailed description of the training and implementation approach, and commitment of resources, to meet this timeline. The District would expect on-site support minimally:

Type of Campus	Number of Sites	Training	Go-Live (Breakfast and Lunch)
<b>Year Round</b>	<b>4 Total</b> 2 ES 2 K8	7/28/2014	7/29/2014
<b>Traditional</b>	<b>31 Total</b> 20 ES 6 MS 4 HS 1 Alt. HS	8/28/2014	9/2/2014

**P1.10** Describe timeline and approach for Back-of-House implementation. IUSD desires to implement Back-of-House after the Point-of-Sale cutover, if possible. Identify any components of the Back-of-House implementation that must be in place prior to the Front-of-House implementation.

**P1.11** Describe Provider’s process and/or expectations for communicating with parents and supporting the transition to a new pre-payment portal and online meal program application.

**Support**

**P1.12** Offer live, expert support through a toll-free phone number at no additional cost from 6:00am to 5:00pm PST. Identify support structures for staff and students and families. Define whether the first point of contact for support is expected to be District or Provider staff for each audience.

**P1.13** Offer 24-hour emergency support for major outages and/or issues preventing meal-service throughout the District.

**P1.14** Describe the company’s standard response times as well as issue escalation procedures.

**P1.15** Provide electronic, editable copies of training materials as well as suggestions for use and best practices as part of the training process.

**P1.16** Provide full-time, company-employed customer service professionals who are trained specifically to support the needs of K-12 public schools.

**P1.17** Require background checks for all support personnel before hiring.



**P1.18** Provide assurance that your company does not outsource customer support.

## **Part 2: Front-of-House Requirements**

Describe in detail the functionality available through the Front-of-House components of the proposed system. Include Point-of-Sale, online and scanned meal applications, prepayment portals, and other features directly supporting meal service.

Minimum Requirements/Supporting Information:

### **Point-of-Sale**

- P2.1** System navigation and operations shall be intuitive, with a uniform look and feel to all aspects of the application.
- P2.2** IUSD staff shall have the ability to color code, resize and arrange buttons to support ease of use and efficient tendering.
- P2.3** The system shall be designed to support efficient tendering, including buttons for common cash denominations and one-touch solutions for calculating change or adding change to a student's account.
- P2.4** Describe features of the system that support fast service, including auto-sale functionality, system response times.
- P2.5** The system shall support a minimum of five students in the queue and the ability for the cashier to easily take those students out-of-sequence (e.g., visible pictures of 5 waiting students, touch the photo to pull up the appropriate student).
- P2.6** Describe input options for student identifiers. Minimally, the system must support pin pads, card readers, biometric scanner (e.g., fingerprint or palm reader), sell-by-photo.
- P2.7** The system import and display student photos to support a positive confirmation of identity by the cashier.
- P2.8** IUSD District staff shall have the flexibility to determine whether account balances are enforced for staff and students. The District shall be able to set a maximum overage amount that is different for those populations.
- P2.9** In the event of a network outage/interruption, the system shall transition seamlessly between working offline and online. No intervention by the user or manager shall be necessary, and no delays in processing transactions shall occur as the result of an outage.
- P2.10** The system shall support the use of a mobile device/tablet as a point of sale terminal.
- P2.11** Allow cashiers to quickly return to previous transactions to make corrections or adjustments (Examples: Cashier made an error in the amount collected from the student, student wants an additional item immediately after transaction has been completed).
- P2.12** Multiple lines at sites shall be actively integrated with a central machine/database during the meal period to prevent under/overcharging of students with multiple meals and/or a la carte items from multiple lines.
- P2.13** The system shall support sending messages between the lines (e.g., request for assistance, change, food items).



- P2.14** Student-specific alerts (e.g., allergies) will display on the cashier’s screen.
- P2.15** Ability to display date and student-specific events (e.g., Birthday message) on the cashier’s terminal.
- P2.16** All District students shall be available instantly from the line (whether or not they are at the specific school site).
- P2.17** Provide a streamlined process for collecting accountability and sales information in the event of a global technology failure.
- P2.18** Provide an efficient and accurate method for daily closing procedures.
- P2.19** Describe solutions to identify and prevent common errors and other anomalies during service and end-of-day reporting.
- P2.20** Point-of-Sale software must be able to run on a standard Windows 7 machine (with Windows 8 currently available or available within one year of purchase date). No proprietary hardware is required.

### **Application Processing/Free and Reduced**

- P2.21** Describe solutions embedded in the Point-of-Sale and meal application process to prevent overt identification.
- P2.22** Provide the District the ability to offer an online or scan-ready meal application.
- P2.23** Allow forms to be prepopulated with student/family information through the Student Information System.
- P2.24** Allow the District to include additional, custom fields on the meal application.
- P2.25** Describe support for Direct Certification.
- P2.26** Describe how the system supports efficient processing of applications, including scanning speed, review of errors, and electronic/automated review and approval processes.
- P2.27** Define the system’s support for the verification process, including:
  - Radom Audits: Automated selection and notification of families selected for random audit. Describe processes that are executed by the system and those that require intervention/oversight from IUSD staff.
  - Verification for Cause: Describe how the system supports “flagging” a record as needing verification for cause, notifying the family, and completing the audit process.
- P2.28** Describe notification capabilities of the system, including automated emails to all families, all families without a meal application on file, and all families subject to an audit or other criteria available in the system. If internal notifications are not available, describe the company’s experience with integrating with enterprise notification systems (e.g., SchoolMessenger).
- P2.29** Provide translated forms (or support for form translation) in at least Spanish, Chinese, Korean, and Farsi.

### **Parent Portal and Pre-Payments**

- P2.30** The system shall include a low-cost, provider-hosted online prepayment service. Detail costs per transaction and/or dollar amount.
- P2.31** The prepayment system will accept credit cards, debit cards, and e-checks.





- P2.32** Payments will be accepted online, 24 hours/day, 7 days/week.
- P2.33** The system shall work with common browsers, including Internet Explorer, Safari, Firefox and Chrome.
- P2.34** Parents with multiple students will manage accounts for both students under a single log-on.
- P2.35** The system/company shall provide check recovery services.
- P2.36** The system will offer features/equipment to support on-site prepayment by parents and students.
- P2.37** Describe notification capabilities of the system, including automated emails to all families, low or negative balance alerts, and promotions other criteria available in the system. If internal notifications are not available, describe the company's experience with integrating with enterprise notification systems (e.g., SchoolMessenger).
- P2.38** The provider shall assume full responsibility for the security of the system and compliance with all requirements for the security of the transactions.
- P2.39** The system shall support the ability to collect payment for additional needs, including fees, donations, and purchases.
- P2.40** The system shall allow each item to be associated with specific account codes to support appropriate reconciliation and depositing to appropriate budget resources.

### **Part 3: Back-of-House Requirements**

Provide detailed information on the proposed solution's support for Back-of-House operations for Nutrition Services. Include descriptions of functionality designed for inventory management, procurement, production, menu planning, distribution and catering. Also, describe any Back-of-House features not specifically requested by IUSD that you feel would support the District's needs. Explicitly identify any features not identified in the base pricing on the cost form.

Minimum Requirements/Supporting Information:

#### **Inventory Management**

- P3.1** Provide inventory tracking capacity to support and differentiate food (refrigerated, frozen, dry) and supplies (paper products, cleaning products).
- P3.2** Effectively identify and track USDA commodities.
- P3.3** Allow Inventory counts to be adjusted through bar code scanning and simple data entry forms via mobile device.
- P3.4** Provide functionality for tiered categorization of inventory items for consolidated reporting, efficient data collection.
- P3.5** Provide the ability to record and distribute inventory in bulk (by case) or by unit. Automate disaggregation of available units in a case.
- P3.6** Offer site-based and district reporting to support proactive ordering and redistribution.
- P3.7** Support tracking of transfers of food and supplies between central kitchen/warehouse and sites.
- P3.8** Describe tools to support communications of product shortages and recalls.



- P3.9** Integrate inventory with front-of-house sales information and financial reporting tools.
- P3.10** Maintain a searchable audit of user activity/changes in inventory.
- P3.11** Reporting must minimally include:
  - Cost forecasting,
  - Inventory on-hand,
  - Shortages, overages, excessive spoilage, and
  - Transfers of inventory.

### **Procurement**

- P3.12** Nutrition Services staff may define items that sites may order.
- P3.13** Describe the system workflow for reviewing and approving and/or rejecting site orders.
- P3.14** Provide the ability to custom configure a review process, allowing some sites/items to be ordered directly and audited/reviewed as needed through reports and the ability to enforce central review prior to order for some sites/items. Include descriptions of any automatic notification processes available to support the approval workflow.
- P3.15** Consolidate site orders for efficient creation of Purchase Orders (PO) to each vendor, track associated PO number and easily disaggregate order for distribution to sites.
- P3.16** Ability to transmit orders directly to key vendors (current vendors include: Sysco, Sunrise, Leabo, Gold Star, P&R).
- P3.17** Reporting: Reports of procurements requested and process must be viewable by site, vendor, or item.
- P3.18** Describe tools to support verifying invoice against orders and received goods.
- P3.19** Describe functionality to support project or procurement needs based on sales and planned meals.
- P3.20** Provide automatic updating of inventory upon confirmation of receipt of the order.

### **Production**

- P3.21** The system shall determine daily inventory based on scheduled meal plans.
- P3.22** Describe solution's capabilities to identify shortages and possible substitutions.
- P3.23** The system shall be able to add leftovers from inventory to daily production.
- P3.24** The system shall be able to print pull tickets based on individual recipe or all combined recipes, including the recipe yield on the ticket.
- P3.25** Document temperatures and maintenance of HACCP procedures to ensure compliance.
- P3.26** Describe the system's ability to track personnel time and determine labor costs by recipe.
- P3.27** Describe how the system supports efficient entry of end of data processing data.
- P3.28** The system shall allow IUSD staff to add leftovers to inventory or discard.
- P3.29** Discarded inventory shall be tracked by item and by school site.



- P3.30** Inventory levels shall be adjusted automatically based on daily production.
- P3.31** Reporting shall minimally include: profit loss, excessive waste, and labor cost tools.

### **Menu Planner/Nutrition (Optional Requirement)**

- P3.32** The system shall be integrated with the USDA database and approved by USDA for menu planning.
- P3.33** Based on menus, the system shall be able to forecast inventory and costs
- P3.34** The system shall perform nutritional analysis.
- P3.35** Describe how the solution tracks recipe information, providing for easy configuration and editing of recipes.
- P3.36** Provide an Intuitive tool for building menus meeting nutritional requirements and cost targets.
- P3.37** Include flexible menu scheduling/calendar options that includes:
  - Custom, cycle menus
  - Grouping of sites for applying menus
  - Exporting menus to other applications for formatting for publication or digital signage.
- P3.38** Required: Please describe support for integrating with third-party meal-planning applications (including standard import formats if available).

### **Distribution/Central Kitchen Support**

- P3.39** Describe the points of integration and process automation with procurement and inventory systems.
- P3.40** The system shall be able to identify shortages based on individual site and district-wide inventories and orders.
- P3.41** The system shall support efficient redistribution of inventory between sites.
- P3.42** Describe support for remediating shortages, including, identifying substitute products and tracking expected deliveries of ordered products.
- P3.43** Create pull orders based on location/route.
- P3.44** The system shall automatically update inventory after products are distributed to sites.
- P3.45** Describe features to support electronic confirmation/acceptance by the site lead when items are delivered.
- P3.46** Describe Support for ad-hoc/immediate ordering and delivery

### **Catering**

- P3.47** Describe any additional features designed specifically to support catering services.
- P3.48** Provide an online ordering form or the ability to integrate with at third-party form. If the solution does not include an online form, provide sample import formats for integrating with an external form.
- P3.49** Support the efficient creation, revision, and confirmation of menus, proposals, and invoices.



- P3.50** Provide automated notifications for event reminders, menu/order confirmation, and invoices due.
- P3.51** Describe integration with production and inventory systems for consolidated reporting.
- P3.52** Allow Nutrition Services staff with appropriate permissions override pricing to apply discounts.

**Part 4: Reporting and Analytics**

Describe in detail commonly used reports and analysis tools available in the system. Please provide sample reports with descriptions of the application of specific reports. Reports should minimally support daily sales, accountability reporting, participation rates, low balance information, inventory tracking, distribution, waste, profit/loss, and procurement reports. Describe also any dashboarding or live analytics available to support decision-making.

Minimum Requirements/Supporting Information:

- P4.1** Standard Reports: Provide samples and descriptions of most commonly used standard reports.
- P4.2** Custom Reports: Describe tools available for IUSD to create custom reports, including features and limitations of report designer tools available in the system.
- P4.3** Confirm that provider will provide a data schema/dictionary upon award to support IUSD staff in creating custom extracts.
- P4.4** Describe functionality available to schedule reports to run, and distribute them via email or other tool automatically on a recurring basis.
- P4.5** Describe how row-level (school site) and role security are enforced in the reporting tool. For example, can a single report instance be set up where each site will only see their individual results.
- P4.6** Describe support for live dashboarding/analytics to support identifying problem areas during service or track performance benchmarks.

**Part 5: Technical Requirements**

Provide evidence to support the system’s security, reliability, and interoperability. Include details about integration methodology, release schedules, service level agreements, and company development and/or security certifications.

Minimum Requirements/Supporting Information:

**General**

- P5.1** Provided detailed information on components of the system that are expected to be hosted or on-premise (IUSD). For on-premise systems, provide detailed information on recommended (not minimum) hardware requirements.
- P5.2** Provide information regarding the database platform and versions supported



(MS SQL version 2012 preferred). Confirm that the solution can be run in a Virtualized environment (IUSD is standardized on Hyper-V).

- P5.3** Provide details regarding provider needs and expectations for remote access to systems and open ports required for communication and data exchange between system components.
- P5.4** The system shall be available 24/7, 365 days per year. Provide details related to scheduled maintenance windows and precautions taken to ensure high availability.
- P5.5** Describe vendor process for testing and releasing software updates, and providing for business continuity during major upgrades. Describe expectations of District staff to apply upgrades for systems.
- P5.6** The system shall be designed to anticipate and provide for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users.

### **Performance and Reliability**

- P5.7** Describe performance monitoring or other tools/techniques used to ensure consistent response times and availability of the application.
- P5.8** Describe vendor recommended/used database backup, system recovery, and failover capabilities to minimize the system downtime and risk of data loss
- P5.9** The provider must state uptime for the system for the past 3 (three) years. Uptime must include scheduled maintenance. Describe process for maintenance and uptime service level agreement.
- P5.10** Describe vendor support for disaster recovery of the complete solution in the instance of data corruption, complete data failure, complete server failure, or complete site failure. Provide evidence of comprehensive disaster recovery meeting.
- P5.11** The provider must describe any failures in the past 3 (three) years. Identify any customers that experiences lost or compromised data and the source of the issue.

### **Data and Interoperability**

- P5.12** IUSD requires full access to extract user-generated, system and usage data. Please describe how your proposed system supports this requirement.
- P5.13** Active Directory/LDAP integration for authentication/authorization.
- P5.14** Provide a list of all Student Information System, Financial and Notification Systems that your proposed solution is currently integrated with. Identify references for solutions currently in use in IUSD (Aeries, Bitech, SchoolMessenger).
- P5.15** Describe your data integration and loading process, include sample file layouts.
- P5.16** Describe support for creating custom, scheduled imports and exports.

### **Security**

- P5.17** The provider's information security policies are documented and available to clients upon request.



- P5.18** The provider must provide a description of their policy regarding storage, retention, and distribution of data. The provider must state the company data non-release policy.
- P5.19** The provider must allow the District to review internal and/or 3<sup>rd</sup> party audits.
- P5.20** The provider must be able to warrant that they provide background checks on all employees, and/or that only employees who have undergone said background checks will have access to client data.
- P5.21** The provider must explain internal company protocols regarding the handling of client data. The provider must require all employees to sign data handling agreements at hire.
- P5.22** The provider must certify that it employs and will continue to employ a dedicated CISSP certified security manager or the equivalent in certification to test the system and run ongoing checks/improvements.
- P5.23** The provider must be able to provide access limitations based upon district roles, and give the site system administrator a tool to modify access rights at the individual level. The provider's system must be configurable to provide specific user rights and roles and to restrict data access and administrative oversight to the appropriate personnel.
- P5.24** The system shall effectively secure and protect student information. Please describe the security measures (physical and technological) taken to protect data.
- P5.25** The vendor agrees that, even if the proposed solution or a portion of the proposed solution, is hosted by the vendor, data housed in the system remain the sole property of IUSD and cannot be used in any way not explicitly approved by the district.
- P5.26** The provider agrees that no third-party shall be given access to District data for any reason without explicit, written authorization from the District. Any third party used to support the system must be identified as a designated subcontractor in the RFP response.

**Part 6: Desired, Additional, and Future Functionality and Services**

Please describe any functionality available as part of the core/proposed solution or as an optional solution that is available for purchase at an additional cost to the District. Functionality may include reimbursable vending solutions, bidding tools, custom registration forms through the payment portal), or other services the Provider would recommend to IUSD.

Please also provide a brief description of planned future development that may be of benefit to the District.

**Part 7: Cost**

Detail all costs associated with the proposed solution, including the implementation, software licensing and maintenance, ongoing support, recommended professional services, and costs of optional services and products. Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, bundled purchases) that apply to the listed costs.



**P7.1 Front-of-House Costs**

<b>FOH One Time Costs</b>			
<b>Item</b>	<b>Examples of Included Items</b>	<b>Unit Cost</b> <i>(Indicate Flat Cost or Per Student, Staff, User, etc)</i>	<b>Estimated Total Cost</b> <i>(Year 1)</i>
<b>Software</b>	<i>Point of Sale Software for approximately 36 sites, 75 total lines. Prepayment portal for families. Online and scanned meal application processing solution.</i>		
<b>Hardware</b>	<i>Any hardware required to run the system(s). Provider may include cost and recommended requirements (as an attachment). If IUSD costs (through discounts) are lower, those costs will be substituted. Do not include POS terminals or Student Identification peripherals unless proprietary hardware is required by your solution. Do include any server hardware necessary.</i>		
<b>Implementation</b>	<i>Data Integration, Transition from Existing Systems (Meals Plus, eFunds), Project Management, Professional Services, Configuration Support, User/Permissions Setup Training</i>		
<b>Training</b>	<i>In depth training for Nutrition Services team. Turn-key cashier and site lead training on dates specified in the RFP. Training Documentation (Electronic and Editable per RFP)</i>		
<b>Other</b>	<i>Please Describe:</i>		
<b>Total One-Time Costs</b>			



FOH Annual Recurring Costs			
Item	Examples of Included Items	Unit Cost <i>(Indicate Flat Cost or Per Student, Staff, User, etc)</i>	Estimated Annual Cost
Maintenance and Support	<i>Software, maintenance, support, software updates/upgrades, updated training materials and release notes</i>		
Other	<i>Please Describe:</i>		
<b>Total One-Time Costs</b>			

**Year 1 Maintenance Due:** *Indicate whether implementation costs include first-year maintenance, OR first-year maintenance will be billed in addition to implementation costs in Year 1.*

- First-Year Maintenance will be billed during the implementation year.
- First-Year Maintenance will be billed one year after the system is in productive use.
- Other- Please Describe: \_\_\_\_\_





**P7.2 Back-of-House Costs**

<b>BOH One Time Costs</b>			
<b>Item</b>	<b>Examples of Included Items</b>	<b>Unit Cost</b> <i>(Indicate Flat Cost or Per Student, Staff, User, etc)</i>	<b>Estimated Total Cost</b> <i>(Year 1)</i>
<b>Software</b>	<i>Back-of-House Software to support requirements associated with inventory management, procurement, production, menu planning, distribution and catering.</i>		
<b>Hardware</b>	<i>Any hardware required to run the system(s). Provider may include cost and recommended requirements (as an attachment). If IUSD costs (through discounts) are lower, those costs will be substituted. If costs are included in the FOH costs, indicate included and do not duplicate costs in this section.</i>		
<b>Implementation</b>	<i>Data Integration, Transition from Existing Systems (Meals Plus), Project Management, Professional Services, Configuration Support, User/Permissions Setup Training</i>		
<b>Training</b>	<i>In depth training for Nutrition Services team. Training Documentation (Electronic and Editable per RFP)</i>		
<b>Other</b>	<i>Please Describe:</i>		
<b>Total One-Time Costs</b>			



<b>BOH Annual Recurring Costs</b>			
<b>Item</b>	<b>Examples of Included Items</b>	<b>Unit Cost</b> <i>(Indicate Flat Cost or Per Student, Staff, User, etc)</i>	<b>Estimated Annual Cost</b>
<b>Maintenance and Support</b>	<i>Software, maintenance, support, software updates/upgrades, updated training materials and release notes</i>		
<b>Other</b>	<i>Please Describe:</i>		
<b>Total One-Time Costs</b>			

**Year 1 Maintenance Due:** *Indicate whether implementation costs include first-year maintenance, OR first-year maintenance will be billed in addition to implementation costs in Year 1.*

- First-Year Maintenance will be billed during the implementation year.
- First-Year Maintenance will be billed one year after the system is in productive use.
- Other- Please Describe: \_\_\_\_\_



**P7.3 Optional Services and Costs**

Optional Services/Solutions and Costs			
Item	Description	Unit Cost <i>(Indicate Flat Cost or Per Student, Staff, User, etc)</i>	Estimated Total Cost <i>(Year 1)</i>
		Recurring/One-Time	Recurring/One-Time
		Recurring/One-Time	Recurring/One-Time
		Recurring/One-Time	Recurring/One-Time
<b>Total Costs</b>			
<input type="checkbox"/> <b>Optional Services/Costs are required to meet one or more of the Minimum Requirements defined in this RFP.</b>			
<b>If box above is checked, list requirements that are dependent on the Optional Services/Costs OR future development efforts.</b>			



**Part 8: Exceptions**

Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the District’s standard agreement. For each exception, propose acceptable alternative language and/or provide rationale to support the exception. Exceptions that are contrary to the District’s best interests, do not meet the needs of our staff and students, or conflict with regulations related to public contracts and procurement will not be accepted by the District and may be cause for rejection of the proposal.

**Part 9: Required Forms**

All required forms must be submitted as part of the Providers complete proposal on or before the Proposal Deadline specified in the calendar of events. Required Forms are included in Appendix B of this document and listed below.

- Proposal Submission Checklist
- Purchase Agreement
- Acknowledgment of Amendments to RFP
- Provider Representation and Certification
- Noncollusion Declaration
- Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
- Certification on Restrictions on Lobbying

**Part 10: Optional Forms**

Optional Forms are not required to be submitted with the Providers proposal. However, Optional Forms listed below must be submitted by the selected Provider within ten (10) days of the notification of the District’s Intent to Award. Optional Forms are included in Appendix C of this document and listed below.

- Workers’ Compensation Certificate
- Drug Free Workplace Certification
- Tobacco Use Policy
- Notice to Contractors Regarding Criminal Records Check
- Criminal Records Check Certification by Contractor
- W-9

\*\*\*End of Proposal Content/Sequence Requirements \*\*\*



## **Appendix A: District Standard Agreement**



## CONSULTANT AGREEMENT

This AGREEMENT is made and entered into this **XX** day of **XXXX**, **20XX** between the Irvine Unified School District, hereinafter referred to as “DISTRICT,” and **(Consultant’s Name)**,

Mailing Address City State Zip Telephone Number

hereinafter referred to as “CONSULTANT.”

WHEREAS, DISTRICT is authorized by Section 53060 of the California Government Code to contract with and employ any persons for the furnishing of special services and advice in financial, economic, accounting, engineering, legal or administrative matters, if such persons are specially trained and experienced and competent to perform the special services required;

WHEREAS, DISTRICT is in need of such special services and advice; and

WHEREAS, CONSULTANT is specially trained and experienced and competent to perform the special services required by the DISTRICT, and such services are needed on a limited basis;

NOW, THEREFORE, the parties agree as follows:

1. Services to be provided by CONSULTANT:

Describe services here

2. Term. CONSULTANT shall commence providing services under this AGREEMENT on **XXXXXX XX**, **20XX**, and will diligently perform as required and complete performance by **XXXXXX XX**, **20XX**.

3. Compensation. DISTRICT agrees to pay the CONSULTANT for services satisfactorily rendered pursuant to this AGREEMENT a total fee not to exceed **(Amount in words)** Dollars (\$**XXXXXX**.00). DISTRICT shall pay CONSULTANT within thirty (30) days of receipt of CONSULTANT’s invoice detailing the services rendered..

4. Expenses. DISTRICT shall not be liable to CONSULTANT for any costs or expenses paid or incurred by CONSULTANT in performing services for DISTRICT.

5. Independent Contractor. CONSULTANT, in the performance of this AGREEMENT, shall be and act as an independent consultant. CONSULTANT understands and agrees that he/she and all of his/her employees shall not be considered officers, employees or agents of the DISTRICT, and are not entitled to benefits of any kind or nature normally provided employees of the DISTRICT and/or to which DISTRICT’s employees are normally entitled, including, but not limited to, State Unemployment Compensation or Workers’ Compensation. CONSULTANT assumes the full responsibility for the acts and/or omissions of his/her employees or agents as they relate to the services to be provided under this AGREEMENT. CONSULTANT shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to CONSULTANT’s employees.

6. Materials. CONSULTANT shall furnish, at his/her own expense, all labor, materials, equipment, supplies and other items necessary to complete the services to be provided pursuant to this AGREEMENT. CONSULTANT’s services will be performed, findings obtained, reports and recommendations prepared in accordance with generally and currently accepted principles and practices of his/her profession.

7. Originality of Services. CONSULTANT agrees that all methods, writings, ideas,



technologies, formulae, procedures and/or processes prepared for, written for, submitted to the DISTRICT and/or used in connection with this AGREEMENT, shall be wholly original to CONSULTANT and shall not be copied in whole or in part from any other source, except that submitted to CONSULTANT by DISTRICT as a basis for such services.

8. Copyright/Trademark/Patent: CONSULTANT understands and agrees that all matters produced under this AGREEMENT shall become the property of DISTRICT and cannot be used without DISTRICT's express written permission. DISTRICT shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark and/or patent of said matter in the name of the DISTRICT.

9. Termination. DISTRICT may, at any time, with or without reason, terminate this AGREEMENT and compensate CONSULTANT only for services satisfactorily rendered to the date of termination. Written notice by DISTRICT shall be sufficient to stop further performance of services by CONSULTANT. Notice shall be deemed given when received by the CONSULTANT or no later than three days after the day of mailing, whichever is sooner.

DISTRICT may terminate this AGREEMENT upon giving of written notice of intention to terminate for cause. Cause shall include: (a) material violation of this AGREEMENT by the CONSULTANT; or (b) any act by CONSULTANT exposing the DISTRICT to liability to others for personal injury or property damage; or (c) CONSULTANT is adjudged a bankrupt, CONSULTANT makes a general assignment for the benefit of creditors or a receiver is appointed on account of CONSULTANT's insolvency. Written notice by DISTRICT shall contain the reasons for such intention to terminate and unless within ten (10) days after service of such notice the condition or violation shall cease, or satisfactory arrangements for the correction thereof be made, this AGREEMENT shall upon the expiration of the ten (10) days cease and terminate. In the event of such termination, the DISTRICT may secure the required services from another consultant. If the cost to the DISTRICT exceeds the cost of providing the service pursuant to this AGREEMENT, the excess cost shall be charges to and collected from the CONSULTANT. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to DISTRICT. Written notice by DISTRICT shall be deemed given when received by the other party, or no later than three days after the day of mailing, whichever is sooner.

10. Hold Harmless. CONSULTANT agrees to and does hereby indemnify, hold harmless and defend the DISTRICT and its governing board, officers, employees and agents from every claim or demand made and every liability, loss, damage or expense, of any nature whatsoever, which may be incurred by reason of:

a. Liability for damages for: (1) death or bodily injury to person; (2) injury to, loss or theft of property; or (3) any other loss, damage or expense arising out of (1) or (2) above, sustained by the CONSULTANT or any person, firm or corporation employed by the CONSULTANT, either directly or by independent contract, upon or in connection with the services called for in this AGREEMENT, however caused, except for liability for damages referred to above which result from the negligence or willful misconduct of the DISTRICT or its officers, employees or agents.

b. Any injury to or death of any person(s), including the DISTRICT's officers, employees and agents, or damage to or loss of any property caused by any act, neglect, default, or omission of the CONSULTANT, or any person, firm or corporation employed by the CONSULTANT, either directly or by independent contract, arising out of, or in any way connected with, the services covered by this AGREEMENT, whether said injury or damage occurs either on or off DISTRICT's property, except for liability for damages which result from the sole negligence or willful misconduct of the DISTRICT or its officers, employees or agents.



c. Any liability for damages which may arise from the furnishing or use of any copyrighted or uncopyrighted matter or patented or unpatented invention under this AGREEMENT.

11. Insurance. Pursuant to Section 10, CONSULTANT agrees to carry comprehensive general and automobile liability insurance mutually acceptable to both parties to protect CONSULTANT and DISTRICT against liability or claims of liability which may arise out of this AGREEMENT. In addition, CONSULTANT agrees to provide an endorsement to this policy stating, “Such insurance as is afforded by this policy shall be primary, and any insurance carried by DISTRICT shall be excess and noncontributory.” No later than ten (10) days from execution of this AGREEMENT by the DISTRICT and CONSULTANT, CONSULTANT shall provide DISTRICT with certificates of insurance evidencing all coverages and endorsements required hereunder including a thirty (30) day written notice of cancellation or reduction in coverage if required by the DISTRICT. CONSULTANT agrees to name DISTRICT and its governing board, officers, agents and employees as additional insureds under said policy.

12. Assignment. The obligations of the CONSULTANT pursuant to this AGREEMENT shall not be assigned by the CONSULTANT.

13. Compliance With Applicable Laws. The services completed herein must meet the approval of the DISTRICT and shall be subject to the DISTRICT’s general right of inspection to secure the satisfactory completion thereof. CONSULTANT agrees to comply with all federal, state and local laws, rules, regulations and ordinances that are now or may in the future become applicable to CONSULTANT, CONSULTANT’s business, equipment and personnel engaged in services covered by this AGREEMENT or accruing out of the performance of such services.

14. Confidentiality. DISTRICT shall provide CONSULTANT with access to data for the purposes of providing specific services requested by DISTRICT. CONSULTANT shall access and use the data to exclusively provide the services defined in this AGREEMENT. CONSULTANT shall maintain the confidentiality of such information. DISTRICT data remain the sole property of the DISTRICT. CONSULTANT shall not share or allow access to DISTRICT data with any third-party or sub-contractor without the prior written consent of the DISTRICT. The Parties shall each be responsible for their respective roles in managing Student Information and other data in compliance with the Family Educational Rights and Privacy Act (“FERPA”) and any other applicable federal, state, and/or local statutes and legislation regarding data confidentiality and security, and any and all policies of DISTRICT relating thereto.

15. Permits/Licenses. CONSULTANT and all CONSULTANT’s employees or agents shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of services pursuant to this AGREEMENT.

16. Employment With Public Agency. CONSULTANT, if an employee of another public agency, agrees that CONSULTANT will not receive salary or remuneration, other than vacation pay, as an employee of another public agency for the actual time in which services are actually being performed pursuant to this AGREEMENT.

17. Entire Agreement/Amendment. This AGREEMENT and any exhibits attached hereto constitute the entire agreement among the parties to it and supersedes any prior or contemporaneous understanding or agreement with respect to the services contemplated, and may be amended only by a written amendment executed by both parties to the AGREEMENT.





18. Nondiscrimination. CONSULTANT agrees that he/she will not engage in unlawful discrimination in employment of persons because of race, ethnicity, religion, nationality, disability, gender, marital status or age of such persons.

19. Non Waiver. The failure of DISTRICT or CONSULTANT to seek redress for violation of, or to insist upon, the strict performance of any term or condition of this AGREEMENT shall not be deemed a waiver by that party of such term or condition, or prevent a subsequent similar act from again constituting a violation of such term or condition.

20. Notice. All notices or demands to be given under this AGREEMENT by either party to the other, shall be in writing and given either by: (a) personal service or (b) by U.S. Mail, mailed either by registered or certified mail, return receipt requested, with postage prepaid. Service shall be considered given when received if personally served or if mailed on the third day after deposit in any U.S. Post Office. The address to which notices or demands may be given by either party may be changed by written notice given in accordance with the notice provisions of this section. At the date of this AGREEMENT, the addresses of the parties are as follows:

DISTRICT:

Irvine Unified School District  
5050 Barranca Parkway  
Irvine, CA 92604  
Attn: Assistant Superintendent, Business Services

CONSULTANT:

Name  
Street Address  
City Address  
Attn: (if any)

21. Severability. If any term, condition or provision of this AGREEMENT is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.

22. Attorney Fees/Costs. Should litigation be necessary to enforce any terms or provisions of this AGREEMENT, then each party shall bear its own litigation and collection expenses, witness fees, court costs, and attorneys' fees.

23. Governing Law. The terms and conditions of this AGREEMENT shall be governed by the laws of the State of California with venue in Orange County, California. This AGREEMENT is made in and shall be performed in Orange County, California.

24. Exhibits. This AGREEMENT incorporates by this reference, any exhibits, which are attached hereto and incorporated herein.

THIS AGREEMENT IS ENTERED INTO THIS \_\_\_ DAY OF \_\_\_\_, 20\_\_.



IRVINE UNIFIED SCHOOL DISTRICT

By: \_\_\_\_\_

Name:

Title:

*(a Board Authorized IUSD rep. will sign for IUSD)*

CONSULTANT

By: \_\_\_\_\_

Name:

Title:

Taxpayer ID: \_\_\_\_\_

**\* Criminal Record Check (Fingerprint) may be applicable.**



## **Appendix B: Required Forms**



**PROPOSAL SUBMISSION CHECKLIST**

- Part 1: Vendor Support and Ability to Perform
- Part 2: Front-of-House Requirements
- Part 3: Back-of-House Requirements
- Part 4: Reporting and Analytics
- Part 5: Technical Requirements
- Part 6: Desired, Additional, and Future Functionality and Services
- Part 7: Cost
- Part 8: Exceptions
- Part 9: Required Forms
  - Proposal Submission Checklist
  - Purchase Agreement
  - Acknowledgment of Amendments to RFP
  - Provider Representation and Certification
  - Noncollusion Declaration
  - Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
  - Certification on Restrictions on Lobbying
- Part 9: Optional Forms  
*Required of Selected Provider within ten (10) days of Notice of Intent to Award*
  - Workers' Compensation Certificate
  - Drug Free Workplace Certification
  - Tobacco Use Policy
  - Notice to Contractors Regarding Criminal Records Check
  - Criminal Records Check Certification by Contractor
  - W-9



**PURCHASE AGREEMENT**

Upon notification of selection and Board Approval, the undersigned hereby promises and agrees to furnish all articles or services within the dates specified, in the manner and form and at the prices herein stated in strict accordance with the advertisement, specifications, proposals and general conditions all which are made a part of the purchase agreement.

Name under which business is conducted \_\_\_\_\_

Business Street Address \_\_\_\_\_ Tel: \_\_\_\_\_

\_\_\_\_\_ City State Zip Code

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above.

\_\_\_\_\_

IF PARTNERSHIP, sign here:

The undersigned certify that we are partners in the business named above and that we sign this purchase agreement with full authority so to do. (One or more partners sign)

\_\_\_\_\_

IF CORPORATION, execute here:

The undersigned certify that they sign this purchase agreement with full and proper authorization so to do.

Corporate Name

\_\_\_\_\_

Signed \_\_\_\_\_ Title \_\_\_\_\_

Signed \_\_\_\_\_ Title \_\_\_\_\_

Incorporated under the laws of the State of \_\_\_\_\_



**ACKNOWLEDGEMENT OF AMENDMENTS TO RFP**

PROVIDER HEREBY ACKNOWLEDGES RECEIPT OF ANY AND ALL AMENDMENTS TO THE RFP.

If Provider has no knowledge of any amendments to the RFP having been issued to, or received by, Provider, please check following box:

Amendments

Amendment No.	Date Published	Date Received

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature of Authorized Agent

Name and Title of Authorized Agent: \_\_\_\_\_

Name of Provider: \_\_\_\_\_



**PROVIDER REPRESENTATION AND CERTIFICATION**

The undersigned hereby acknowledges and affirms that:

- He/she is a duly authorized agent of the Provider with the authority to submit a Proposal on behalf of the Provider (corporate or other authorization confirmation may be requested prior to final contract execution).
- He/she has read the complete RFP documents and all amendments issued pursuant thereto.
- The Proposal complies with State conflict of interest laws. The Provider certifies that no employee of its firm has discussed, or compared the Proposal with any other Provider or District employee, and has not colluded with any other Provider or District employee.
- If the Provider’s Proposal is accepted by the District, the Provider will enter into a contract with the District to provide the Services, Systems and Equipment described by the Proposal on the terms mutually acceptable to the District and the Provider.
- THE DISTRICT RESERVES THE RIGHT TO REJECT ANY OR ALL PROPOSALS.

I hereby certify that I am submitting the attached Proposal on behalf of [Specific Entity Submitting Proposal].

I understand that, by virtue of executing and returning this required response form with the Proposal, I further certify, that the Provider understands and does not dispute any of the contents of the proposal requirements (except as may be noted in the response).

Provider Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

FAX: \_\_\_\_\_

E-Mail: \_\_\_\_\_

By: \_\_\_\_\_

Date: \_\_\_\_\_

Manual signature of Authorized Agent

Printed Name and Title of Authorized Agent:

\_\_\_\_\_

NOTE: If Joint Venture, each member of the joint venture must provide a completed certificate form.



**NONCOLLUSION DECLARATION**

**TO BE EXECUTED BY PROVIDER AND SUBMITTED WITH PROPOSAL  
(Public Contract Code section 7106)**

The undersigned declares:

I am the \_\_\_\_\_ of \_\_\_\_\_, the party making the foregoing proposal.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The provider has not directly or indirectly induced or solicited any other provider to put in a false or sham proposal. The provider has not directly or indirectly colluded, conspired, connived, or agreed with any provider or anyone else to put in a sham proposal, or to refrain from bidding. The provider has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the provider or any other provider, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other provider. All statements contained in the proposal are true. The provider has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal, and has not paid, and will not pay, any person or entity for such purpose. Any person executing this declaration on behalf of a provider that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the provider. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on \_\_\_\_\_ [date], at \_\_\_\_\_ [city], \_\_\_\_\_ [state].

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name





**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The \_\_\_\_\_  
Firm Name/Principal

Certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local), with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this proposal had one or more public transactions (federal, state or local) terminated for cause or default.

If unable to certify to any of the statements in this certification, the participant shall attach an expiration to this certification.

THE PRIMARY PARTICIPANT \_\_\_\_\_  
Firm Name/Principal

CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

\_\_\_\_\_  
Signature and Title of Authorized Official



**CERTIFICATION OF RESTRICTIONS ON LOBBYING**

I, \_\_\_\_\_, hereby certify on behalf (name of offeror) of

\_\_\_\_\_ that:  
(Firm name)

1. No Federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

2. If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the attached, Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.

3. The undersigned shall require that the language of this certification be included in all subcontracts, and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, 2013

By \_\_\_\_\_  
(Signature of authorized official)

\_\_\_\_\_  
(Title of authorized official)



## **Appendix C: Optional Forms**

Required only of selected provider within ten (10) days of notification of Intent to Award.



**WORKERS' COMPENSATION CERTIFICATE**

Labor Code Section 3700.

"Every employer except the state shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this state.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure either as an individual employer or as one employer in a group of employers, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his or her employees.

(c) For any county, city, city and county, municipal corporation, public DISTRICT, public agency or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702."

I am aware of the provisions of Labor Code Section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

\_\_\_\_\_  
Name of the Contractor

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under the contract.)

IRVINE UNIFIED SCHOOL DISTRICT  
Irvine, California



**DRUG FREE WORKPLACE CERTIFICATION**

This Drug-Free Workplace Certification is required pursuant to Government Code §8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the contractor may be subject to debarment from future contacting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code §8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

- a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;
- b) Establishing a drug-free awareness program to inform employees about all of the following:
  - i. The dangers of drug abuse in the workplace;
  - ii. The person's or organization's policy of maintaining a drug-free workplace;
  - iii. The availability of drug counseling, rehabilitation and employee-assistance programs;
  - iv. The penalties that may be imposed upon employees for drug abuse violations;
- c) Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I the undersigned, agree to fulfill the terms and requirements of Government Code §8355 listed above and will publish a statement notifying employees concerning (a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of statement required by §8355 (a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the DISTRICT determines that I have either (a) made false certification herein, or (b) violated this certification by failing to carry out the requirements of §8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of §8350, et seq.

I acknowledge that I am aware of the provisions of Government Code §8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

\_\_\_\_\_  
Name of Contractor

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title



**TOBACCO USE POLICY**

In the interest of public health, the Irvine Unified School District provides a tobacco-free environment. Smoking or the use of any tobacco products are prohibited in buildings and vehicles, and on any property owned, leased or contracted for, by the District. Failure to abide with this requirement could result in the termination of this contract.

I acknowledge that I am aware of Tobacco Use Policy and hereby certify that I and my employees will adhere to the requirements of the policy.

\_\_\_\_\_  
Name of Provider

\_\_\_\_\_  
Signature

Date \_\_\_\_\_



## **NOTICE TO CONTRACTORS REGARDING CRIMINAL RECORDS CHECK**

(EDUCATION CODE §45125.1)

Education Code §45125.1 provides that if the employees of any entity that has a contract with a school DISTRICT may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice together with a fee determined by the Department of Justice to be sufficient to reimburse the Department for its costs incurred in processing the application.

The Department of Justice shall ascertain whether the individual whose fingerprints were submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code §1192.7(c) or has been convicted of such a felony, the Department shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first-class mail.

The contract shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The contractor shall certify in writing to the Board of Trustees of the school DISTRICT that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal Code §667.5(c) lists the following “violent” felonies: murder; voluntary manslaughter ; mayhem; rape; sodomy by force; oral copulation by force; lewd acts on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited dwelling; arson; penetration of a person’s genital or anal openings by foreign or unknown objects against the victim’s will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking.

Penal Code §1192.7 lists the following : “serious” felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally inflicts great bodily injury on another, or in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non-inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim’s will; grand theft involving a firearm; carjacking; and a conspiracy to commit specified controlled substances offenses.



**CRIMINAL RECORDS CHECK CERTIFICATION BY CONTRACTOR**

(AB 1610, 1612 and 2102)

To the Board of Trustees of Irvine Unified School DISTRICT:

I, \_\_\_\_\_ certify that:  
(Name of Contractor)

1. I have carefully read and understand the Notice to Contractors Regarding Criminal Record Checks (Education Code §45125.1) required by the passage of AB 1610, 1612 and 2102.
2. Due to the nature of the work I will be performing for the DISTRICT, my employees may have contact with students of the DISTRICT.
3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code §1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at \_\_\_\_\_, California on \_\_\_\_\_.  
(City) (Date)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed or printed name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone





**W-9**

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