

# REQUEST FOR QUOTE

## SAN RAMON VALLEY UNIFIED SCHOOL DISTRICT'S CHILD NUTRITION PROGRAM SOLICITATION FOR QUOTE FOR POINT OF SALE SYSTEM & TECHNOLOGY

### A. INTRODUCTION AND OVERVIEW

The San Ramon Valley Unified School District is a TK-12 district located in the central Bay Area. The district is responsible for meeting the educational needs of approximately 32,000 students at twenty two (22) elementary schools, eight (8) intermediate schools, and four (4) high schools.

The Child Nutrition program operates at all thirty four (34) district schools. Lunch is served at all schools, breakfast is served at some, however is expected to be expanded to all. The program currently operates with a Point of Sale system at all schools. The district is self-operating, producing meals with Unionized labor. The main office for Child Nutrition and central warehouse are at the district's Service Center. This solicitation document requests for technology at all schools, as well as the district central office and warehouse. The 22 Elementary Schools currently have one POS, Middle Schools have one to three POS, and High Schools have from four to eleven, but will most likely be increased. The exact number of POS serving lines may increase or decrease depending on program needs. This equates to thirty four (34) manager terminals, approximately four (4) cashier terminals, and five (5) central office terminals.

Type	Number of Schools	Estimated Number of POS Serving Lines
Elementary	22	22
Middle School	8	12-20
High School	4	16-26
Total	34	50-68

### 1. FUTURE PROGRAM PLANS

The SRVUSD's Child Nutrition (CN) program is currently operating a POS at all thirty six sites in the district, as well as an online prepayment module. The current vendor for the Point of Sale system is Primero Edge. CN uses a separate menu and nutritional analysis software and the current vendor is Nutrikids and iSite. Meal Applications are processed through Infinite Campus. Some ordering and inventory is managed through Quintessential School Systems. Production Records are paper based.

At a high level, below is the list of POS capabilities the district is looking to implement:

- Tablets or mobile POS for Grab n Go service lines.
- Improved line speed and recording of student information (for example, recording student account information through phone based smart card or RFID scan).
- Online menus and mobile app with pictures, descriptions, and allergen information. Automatically loads based on planned menus.
- Online pre-ordering of meals for students and staff accounts (desired).
- Reimbursable and a la carte vending machine capability.
- Online Meal Application processing, with multiple languages and must integrate with the district's existing SIS, Infinite Campus.

## 2. CURRENT TECHNOLOGY INFRASTRUCTURE

System	Platform
District Finance, HR, and Payroll	Quintessential School Systems
E-Mail	Gmail
Student Information System	Infinite Campus

### B. GENERAL CONDITIONS & SCOPE OF WORK

The SRVUSD is asking for proposals to provide a food service management Point of Sale (POS) system. The district's primary goal for this solicitation is the selection, implementation, and operation of a Child Nutrition Service program system that will meet the needs of the district for the next ten years. **Quotes can be submitted for one or all of the modules listed below.**

SRVUSD is requesting a system which includes but is not limited to:

- |   |  |
|---|--|
| 1. Point of Sale Software               | 7. Central Kitchen                                 |
| 2. Online Meal Application Processing   | 8. Online Meal Ordering & Payment System           |
| 3. Production                           | 9. Online Menus (Mobile App) & Digital Menu Boards |
| 4. Ordering                             | 10. Web Based Hosting Solutions                    |
| 5. Menu Planning / Nutritional Analysis |  |
| 6. Inventory                            |  |

#### 1. SYSTEM SPECIFICATIONS

Using Appendix A, the quote must respond to every functional, technical, and general implementation requirement contained in the Specifications section of the solicitation using the following criteria. Responses must be in the same order in which points appear in this document.

YES. Requirement will be met. Feature, functions, product, or service is available as requested and is fully operational using the version at one or more districts.

NO. Requirement will not be met. Feature, function, product, or service is not available nor in development.

D (IN DEVELOPMENT). Feature, function, product, or service is under active development and operating in a demonstrable test environment.

C (CUSTOMIZATION). Requirement will be met by customizing existing software for an additional cost to WCSD. Must include estimated costs.

For any specifications for which the answer is other than YES, vendor must describe:

- a) The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the

system proposed.

b) Whether the District will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.

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

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

## **2. PROPOSED TECHNICAL ENVIRONMENT & INTEGRATION PLAN**

In response to this section, please provide an overview of the proposed system, including proposed hardware, software, technical architecture, and the proposed technical approaches to addressing the major areas of functionality that are to be provided within the POS system. High-level diagrams showing major system components, their interrelationships, and supporting diagrams and materials should be included to provide the District with a visual, as well as narrative, representation of the future operating environment.

Within the Proposal, please provide a diagram and a description of the proposed network infrastructure that is required to obtain acceptable performance levels with the proposed Child Nutrition System. The proposed solution must be capable of operating in the District's LAN (local area network) topology (extranet).

Please also include the detailed plan for how the technology will integrate with the existing district systems - Infinite Campus and QSS.

## **3. TRAINING PLAN**

Please describe the process the vendor will use to develop the School District personnel training plan. The plan should address the various training audiences, training topics, proposed training materials and tools, required training logistics, and training evaluation procedures. The quote shall identify the means of delivery and any limitations in terms of frequency, number of hours, or other impositions on the training that will be provided.

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

The District understands that not all personnel need to be trained on all modules of the new system. With that in mind, please complete Appendix C and list your product's module or subject area training sessions by targeted audiences and module content. For each job role in the following tables, please list the subject area modules recommended by job category and include this table in your Proposal using the templates in Appendix C.

The quote should identify the following: A training plan to provide live, interactive, classroom-style training to all applicable District staff members.

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

#### **4. IMPLEMENTATION PLAN**

The installation of the goods, training, and services described in this solicitation must be phased and scheduled to coincide with the District's operational needs guided by the software vendor's best recommendations and practice. Please describe your firm's Project Management Approach used to manage the design, configuration, and implementation of the new software system. The project management components that the vendor is responsible for include, but are not limited to, project work plans, project deliverables, schedules and budgets, risk management, change management, issue management, and quality management. The Project Management Approach shall describe and indicate the sequence and dependencies of major tasks and milestones to be undertaken by the District, the vendor, and other parties, as appropriate and necessary to implement the proposed products. The Proposed Project Plan shall indicate whether the SRVUSD or vendor has primary responsibility for each task. The quote shall outline proposed staffing levels (FTE), roles and responsibilities for a successful implementation for the vendor and the SRVUSD.

#### **5. MAINTENANCE & SUPPORT**

The vendor will be responsible for maintaining the system during the term of the Contract including the vendor warranty period and ongoing maintenance/support through the life of the contract for maintenance with the District. Systems maintenance includes maintaining all system components, including managing and tracking the periodic release of application and source code. The quote should discuss its approach to maintaining all version control methods and tools used to control the release of system versions and source code.

Please address the following in your response to this section:

1. What services are included in your maintenance/support program?
2. What are the hours of maintenance/support coverage (e.g. Weekdays 7am-5pm CST, Weekends 9am-4pm CST, etc.)?
3. What is your program for extended hours of telephone support operations? How are these services invoked and at what cost?
4. Explain your program support request (telephone, email, ticket) submission, escalation, and resolution, tracking and reporting.
5. Procedure for contacting the vendor for support (e.g. Help Desk)
6. Service Level Response Times (defined as the time elapsed between the placement of the call/email/ticket and the start of remedial support activities by

vendor service personnel)

**C. TIMELINE**

SRVUSD would like to begin the transition during the Spring 2022 semester. The system must be implemented, fully operational, and utilized by all applicable SRVUSD schools and central offices by July 1, 2022.

Quotes are due by Friday, 5pm, October 29, 2021

Selected vendor will be invited for demos the week of November 8, 2021

Final decision in December, 2021

**D. SUBMITTAL INSTRUCTIONS**

1. Applicants should include:
  - a. System Specification Checklist (Appendix A)
  - b. Proposed Technical Environment & Integration Plan
  - c. Training Plan
  - d. Implementation Plan
  - e. Maintenance & Support
  - f. Price Sheet (Appendix B)
  - g. References (Appendix C)

**E. EVALUATION & SELECTION CRITERIA**

The quote evaluation will involve scoring each proposal in the following areas listed in order of importance, with respect to the requirements as outlined in this document:

3. Functional Specifications (extent/quality to which the goods/services satisfy the district's needs) – 30 Points
4. Implementation Plan – 10 Points
5. Training Plan – 10 Points
6. Maintenance - 10 Points
7. Pricing Score – 30 Points

**APPENDIX A  
SYSTEM SPECIFICATIONS**

**GENERAL FEATURES**

	<b>Requirement</b>	<b>Response (Y, N, D)</b>	<b>If not Yes, explanation</b>
1	Vendor has successfully implemented proposed solution in a school district with at least 30,000 students.		
2	all modules can be accessed through a single sign-on by the user and the authentication method must be compatible with the district's Active Directory authentication		
3	provides parents with real-time information about menus and lunch money account balances through an integrated, web-based parent portal, or has the capacity to interoperate with an existing parent portal		
4	Provides robust, real time reporting of data to users at all levels, 24/7/365		
5	has the ability to interface with other District applications		

**ON-LINE HELP & DOCUMENTATION**

	<b>Requirement</b>	<b>Response (Y, N, D)</b>	<b>If not Yes, explanation</b>
6	provides online documentation identifying end user step by step procedures for completing tasks and activities as well as online technical documentation		
7	provides for links to online instructional videos based upon context		

## POS HARDWARE

	Requirement	Response (Y, N, D)	If not Yes, explanation
8	Universal keypad acceptance of combo keypad/barcode scanner for entry of PIN, ID, Barcode, or biometric fingerprint scan		
9	Ability for POS Software to run on district provided Chrome OS or Windows 10 OR IOS touch screen devices		
10	Supports dual sided PIN devices per POS station		
11	Supports vending machines with universal vending interface support		

## POINT OF SALE

	Requirement	Response (Y, N, D)	If not Yes, explanation
12	Support multiple Point of Sale terminals per school		
13	Purchases can be made with cash, check or from student's account		
14	Support NO ID cash sales		
15	Support dual serving lines per cashier register		
16	Support prepayment at the POS		
	Supports phone based smart card and RFID student cards		
17	Provide for bar-coded ID card		
18	Ability to use non-proprietary ID reader devices (Pin pad, barcode) for student identification		

	Emergency Roster		
19	Allow sites to print emergency roster by class or grade for manual sales entry, if needed		
20	Patron picture displays at any terminal during sales		
21	Automatically synchronize student eligibility and demographic with the Central Office		
22	POS redundancy		
23	Cashier may still process transaction even if the connection with the network is lost		
24	Software must have a "Principals" or "House" account that student meals can be rung to		
	Vending		
25	Integrated with POS system		
26	Ability to control Breakfast and Lunch operational hours		
27	Ability to sale reimbursable meals at the students eligibility status		
28	Ability to sale reimbursable meals and ala carte sales		
29	Ability to use non-proprietary vending machine		
30	Vending transactions will be recorded on student accounts, if a student account is used		
31	Ability to stop selling reimbursable meals once it can no longer dispense a complete meal		
32	Ability to record pictures with account transactions		



33	Purchases can be made with cash or from student's account		
34	Ability to monitor temperature and lock down (prevent purchases) the machine if temperature has reached an unsafe temperature		

### ONLINE MEAL APPLICATION

	Requirement	Response (Y, N, D)	If not Yes, explanation
35	Software must comply with current USDA meal application regulations		
36	Utilizes guidelines set in place by the current Eligibility Manual For School Meals		
37	Identifies a grace period for "loss of eligibility/pending" applications		
38	Allows for a 30 operating day grace period for previous year eligibility statuses		
39	Ability to "roll over" application status from previous school year		
40	Has a "one window" processing format for ease of use		
41	Ability to "flag" an error prone application at the point of processing		
42	Includes income, case number, foster, direct certification, homeless, runaway and migrant application categories for processing		
43	Automatically communicates new eligibilities to the POS system instantly		
44	Ability to manually expire non-verified applications		
45	Allows for multiple users/locations to enter applications concurrently with no duplication		
46	Provides online meal application in English, Spanish, Korean, Mandarin,		

	Persian, Russian, Tagal, and other TBD languages		
47	Provides for interface to on-line application processing		
48	Notifies the user up to 14 days in advance when a "pending" application expires		
49	Records and tracks any historical changes to applications		
50	Ability to query a customized list of applications by building, grade, eligibility or any combination		
51	Ability to list all "error prone" applications to be viewed in a printable list		
52	Displays reasons for denial during application processing		
53	Ability to automatically export application statuses (submitted, incomplete, declined benefits) and eligibility statuses to Infinite Campus		

## PRODUCTION

	Requirement	Response (Y, N, D)	If not Yes, explanation
54	District can design production records based on their needs and criteria to include inventory item number, vendor item number, pack size, portions per pack and serving size. Information is automatically generated based on the menu		
55	Record target temperature, time of withdrawal of item from heating or cooling source, temperature at withdrawal, and holding temperature on serving line		

## ORDERING

	Requirement	Response (Y, N, D)	If not Yes, explanation
56	Ability to create orders by historical production or sales		
57	Create orders broken out by vendor		
58	Block sites from ordering specific items		

## MENU PLANNING / NUTRITIONAL ANALYSIS

	Requirement	Response (Y, N, D)	If not Yes, explanation
59	USDA approved Nutrient Standard Menu Planning		
60	Complies with HHFKA / Preloaded with the latest USDA Child Nutrition (CN) database version		
61	HACCP, Allergens and Target Temperature support		
62	Create, edit and delete menu templates for each meal and age group		
63	Create, edit and delete cycle menus from menu templates		
64	View average nutrition of a menu for 3-7 days with the ability to drill down to day, menu, pattern, recipe, and item		
65	Display costing per serving, cost per person, and food cost percentage		
66	Calendar menu can be printed and exported to other programs to allow for enhancement with graphic and additional notes		
67	Scale menu forecasts based on entering overall meal count forecast		
68	Allow user to view actual nutrient analysis based on amounts entered from production records		

### Data Management

	Requirement	Response (Y, N, D)	If not Yes, explanation
69	System will interact directly with Infinite Campus to pull data via OneRoster or Clever.		
70	Vendor is responsible for any custom exports and updates required.		
71	Student Photos can be automatically updated from a central file location.		

### FINANCIAL ANALYSIS & ACCOUNTABILITY

	Requirement	Response (Y, N, D)	If not Yes, explanation
72	Generate USDA Edit Check report		
73	Generate USDA approved reimbursement report		
74	Export data to a variety of formats; Excel, Word, PDF, Text and CSV formats/spreadsheets		
75	Bank deposit reconciliation		
76	Centralized payment and refund capabilities		

### ONLINE MEAL ORDERING & PAYMENT SYSTEM

	Requirement	Response (Y, N, D)	If not Yes, explanation
77	The district has the option of absorbing all or a portion of the fee or passing the fee on to the parent/guardian		
78	The software is compatible with the following web browsers: Google Chrome, Internet Explorer, Firefox and Safari		
79	System automatically transfers student		

	balances on to the vendor supplied website		
80	System allows for real-time communication of balance and payment information to the POS database		
81	Allows parents to make payments through multiple forms including credit cards, debit cards and checking accounts		
82	System allows parents to schedule payments on a weekly, biweekly or monthly basis		
83	System allows parents to schedule payments to occur when the balance falls below a designated amount		
84	System allows for future-dated payments based on settings controlled by the parent		
85	Payments are automatically transferred electronically to district bank account on a daily basis		
86	System includes a secure online reporting tool for reporting and reconciliation		
87	Payment reports between the system and POS are fully integrated		
88	All reports can be viewed on screen or printed or exported to multiple file formats		
89	Allows parents to view student transaction information for at least 90 days (purchases, adjustments and prepayments)		
90	Allows the parent the option to opt in for automatic low balance email notification		
91	System generates a deposit summary report by day, week and month		

92	System generates a deposit detail report by day, week and month		
93	System has been certified to meet the appropriate PCI-DSS certification level by an independent third party		
94	System is monitored 24/7 by a security monitoring service with proactive alerts		
95	System includes both a primary data center and a disaster recovery data center		
96	Provides customer support to the parent on the vendor supplied website via FAQs, help desk email and end user support through the telephone		
97	Customer support is provided by toll-free support that is answered by live agents		
98	Includes a payment service marketing kit for parents at no cost		
99	Offers support for customer facing mobile devices		
100	System is listed as a certified solution by a trusted industry such, such as Visa		
101	System provider is a registered third party processor with MasterCard		
102	System provider is fully compliant with all industry rules and regulations		
103	System allows a student to be linked to multiple parent/guardian accounts		
104	System allows a single parent/guardian account to link to many students		
105	System requires verification for adding students to a parent account (ex. completion of student ID, name and other factors)		
106	Ability to publish digital, dynamic menus via website, phone apps, and existing		

	digital signage present at school sites.		
107	Digital menu platform integrates with menu planning module		
108	Ability to include nutritional and allergy content on digital menus		

**APPENDIX B  
SAN RAMON VALLEY UNIFIED SCHOOL DISTRICT CHILD NUTRITION  
POINT OF SALE SYSTEM SOLICITATION FOR QUOTE  
PRICE SHEET**

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

**System License (Annual)**

<b>Item</b>	<b>Description</b>	<b>Quantity</b>	<b>Unit Cost</b>	<b>Total Cost</b>
	Annual License			
	Point of Sale Manager Terminal			
	Point of Sale Cashier Terminal			
	Free & Reduced Eligibility			
	Menu Planning & Nutritional Analysis			
	Production			
	Ordering & Receiving			
	Inventory Management / Warehouse			
	Online Payments			

	Online Menus & Ordering			
	Online Meal Applications			
	Central Kitchen			
	Other:			
	Other:			

**Installation Services**

<b>Item</b>	<b>Description</b>	<b>Quantity</b>	<b>Unit Cost</b>	<b>Total Cost</b>
	Vendor Implementation Project Management			
	System Installation & Implementation			
	Database Management System Installation			
	System Data Conversion / Migration / Data Entry and Import			
	Other:			
	Other:			
	Other:			
	<b>Data Interfaces</b>			
	Infinite Campus Student Information System Data Interface			
	Financial System, Data Repository Data Interface			
	Onsite Go Live / Launch Support			



**APPENDIX C  
REFERENCES**

1. Customer Name: \_\_\_\_\_
  2. Customer Address: \_\_\_\_\_
  3. Current Telephone Number of a Customer Employee Most Familiar with the project along with their email address:
  4. Time period over which each project was completed: \_\_\_\_\_
  5. List of products installed and operational: \_\_\_\_\_
  6. Number of school sites: \_\_\_\_\_
  7. Number of POS service lines: \_\_\_\_\_
  8. Where district hosted serves: \_\_\_\_\_
- 
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